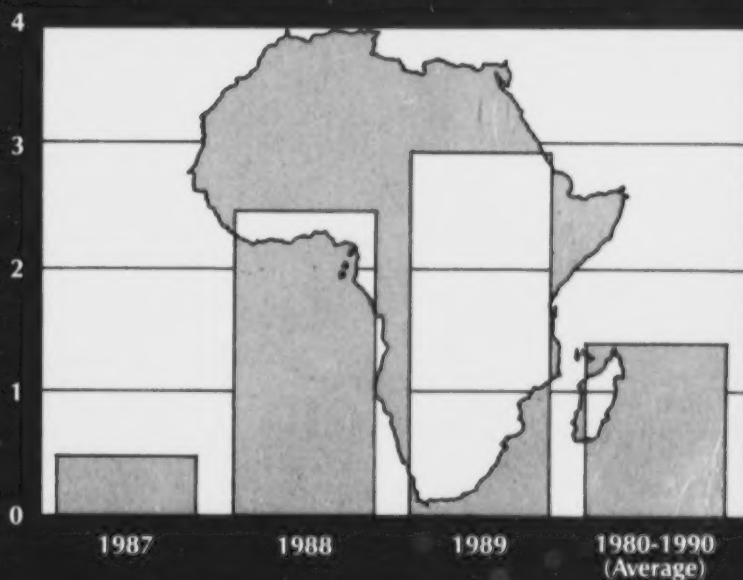


Survey of Economic and Social Conditions in Africa, 1989-1990



UNITED NATIONS

ECONOMIC COMMISSION FOR AFRICA

Survey of Economic and Social Conditions in Africa, 1989-1990



UNITED NATIONS
New York, 1992

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EXPLANATORY NOTES

The designations employed and the presentation of material in this publication do not imply the expression of any opinion whatsoever on the part of the secretariat of the United Nations Economic Commission for Africa concerning the legal status of any country, territory or area or of its authorities, or concerning the delimitation of its frontiers or boundaries, currently or in earlier years to which reference is made.

Symbols of United Nations documents are composed of capital letters combined with figures. Mention of such a symbol indicates a reference to a United Nations document. A symbol which is preceded by the designation E/ECA/... indicates that the document is issued under the auspices of the Economic Commission for Africa.

In the tables throughout the Survey, multiple dots (...) or (...) indicate that data are not available or are not separately reported, while a dash (-) indicates that the amount is nil or negligible and a single dot (.) indicates that the item is not applicable.

A hyphen (-) is used between dates, e.g., 1988-1990, to signify the full period involved, and a stroke (/) indicates a crop year, fiscal year or plan year, e.g., 1988/1989.

The term "billion" signifies a thousand million.

References to "tons" indicate metric tons, and to "dollars" (\$) indicate United States dollars, unless otherwise specified.

ABBREVIATIONS AND ACRONYMS

The following acronyms of organizations and subsidiary bodies are used in the Survey:

ATPC	Association of Tin Producer Countries
CEPGL	Economic Community of the Great Lakes Countries
CFA	African Financial Community
CILSS	Permanent Inter-State Committee on Drought Control in the Sahel
DIESA	Department of International Economic and Social Affairs (of the United Nations)
ECA	Economic Commission for Africa
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EEC	European Economic Community
FAO	Food and Agriculture Organization of the United Nations
GATT	General Agreement on Tariffs and Trade
IEA	International Energy Association
IGADD	Inter-Governmental Authority on Drought and Development
ILO	International Labour Organisation
IMF	International Monetary Fund
OECD	Organisation for Economic Co-operation and Development

OPEC	Organization of Petroleum Exporting Countries
PTA	Preferential Trade Area for Eastern and Southern African States
SADCC	South African Development Co-ordination Conference
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
UNIDO	United Nations Industrial Development Organization

The following abbreviations related to activities of the United Nations system are used in the Survey:

AAF-SAP	African Alternative Framework to Structural Adjustment Programmes for Socio-Economic Recovery and Transformation
APPER	Africa's Priority Programme for Economic Recovery, 1986-1990
IDDA	Industrial Development Decade for Africa: I, 1980-1990; II, 1990-1999
PANAFTEL	Pan-African Telecommunications Network
UN-PAAERD	United Nations Programme of Action for African Economic Recovery and Development, 1986-1990
UNTACDA	United Nations Transport and Communications Decade in Africa: I, 1979-1988; II, 1989-1998

The following economic and technical abbreviations, in addition to the most common abbreviations, symbols and terms, are used in the Survey.

b/d	Barrels a day
ACP	Africa, the Caribbean and the Pacific
DPT	Diphtheria, pertussis and tetanus
GDP	Gross domestic product
GFCF	Gross fixed capital formation
GNP	Gross national product
MVA	Manufacturing value added
ODA	Official development assistance
ODF	Official development finance
ORT	Oral rehydration therapy
PIP	Public investment programming

SAP	Structural adjustment programme (of IMF)
SDR	Special drawing right (of IMF)
TDR	Total dependency ratio
TLU	Tropical livestock unit
TOE	Tons oil equivalent
U5MR	Under-five mortality rate
WAG	Working age group

PART I : OVERALL REVIEW AND OUTLOOK
1989 - 1991

INTRODUCTION

The second half of 1990 and the beginning of 1991 were overshadowed by the Gulf crisis and its consequences. For developing Africa, the main impact was the oil shock in August 1990 which, following the invasion of Kuwait by Iraq, brought crude oil prices to nearly \$40 a barrel by the end of the next month. Oil exporters, of course, benefited from the sudden windfall but for the majority of the countries of the region, which are oil importers, the shock — short-lived though it proved to be — meant that the import bill was higher and hence that less resources were available for other equally vital imports.

At the same time as oil prices rose, most commodity prices fell and most oil importers saw their export revenues decline. The 1990 agricultural season had in any case been a rather poor one and in some countries, for example, Ethiopia and the Sudan, drought reappeared. In the Sudan, large-scale famine ensued. Political strife in the form of either civil war or widespread disturbances affected many countries. The year 1990 was therefore a bad one for the majority of African countries and, as shown in subsequent chapters of this Survey, recession hit many of them: output growth in the region was pulled down to 2.6 per cent — once again, below the rate of population growth.

This 1989-1990 edition of the *Survey of Economic and Social Conditions in Africa* follows broadly the same plan as its predecessors. After covering the international economic situation and its repercussions on developing Africa, the Survey discusses overall economic conditions in the region in 1990 and the prospects for 1991. It analyses changes in development policies, merchandise trade, foreign debt and resource flows. It examines fiscal and monetary developments and the inflation of consumer prices. It then moves on to a review of the main sectors of the economy: agriculture, energy and mining, manufacturing industry, and transport and communications. A final chapter deals with social issues and a statistical annex presents available data on the main economic and social variables.

The staff of the Socio-Economic Research and Planning Division of the Economic Commission for Africa (ECA), which is responsible for the preparation of the Survey, is aware of the many limitations of the published data and other information which it uses. For that reason, field missions are organized each year to

the largest possible number of countries in the region in order to bring that information up to date, to ascertain current trends in the economies of those countries and to discuss issues with officials of their Governments. At the same time, information which can be collected from other sources, such as other international organizations, the economic press and other media, is sought out and used where possible to fill the gaps in existing series.

The estimate of the growth in output of developing Africa in 1990 which is presented in the Survey — 2.6 per cent — should naturally be interpreted with caution, but it seems to the secretariat of the Commission to be well within the realm of reality, especially if it is compared to the current estimates of 3.3 per cent in 1989. There was clearly a significant slowdown in the region's growth in 1990, with recession in many areas. Yet, a slight recovery appeared probable during the second half of 1990 and the beginning of 1991, because the oil shock came to an end and there was a significant improvement in agricultural production.

That is not to say that the African region is out of trouble. Its crisis has not yet ended and to date there is hardly any country in the region which can be said to be securely on a path of stable and regular growth. The structures necessary for development are just being set up as part of the efforts for reform and adjustment now under way. That entails overcoming considerable difficulties, however, because the policies and institutions which have been in operation since the early 1960s have now to be overhauled. That creates serious social and political problems. The burden of foreign debt still hangs over the region: repayment obligations which are unsustainable and which divert resources needed for productive investment. Furthermore, the revolutionary changes taking place in Eastern Europe and USSR may have negative repercussions for the African region: less aid may well flow its way than before. Moreover, those changes are having a deep influence on social and political conditions inside the region. They have intensified the demand for greater mass participation in the political process. They seemingly invalidate the development model in use since independence. There is, however, no fundamental reason for what has been called "Afro-pessimism": the African region has enormous untapped resources, both human and natural, and the right policies should produce eventually the right results.

I. THE INTERNATIONAL ECONOMY

A. Output growth in 1990

Even before the outbreak of the Gulf crisis, there was a marked slowdown in the world economy, particularly in the United States of America (USA), where signs of its onset had been evident since the latter part of 1989. After seven years of continuous growth, the economies of USA and the other industrialized countries were experiencing supply shortages, as the very high levels of capacity utilization confirm. In USA other factors, mainly fiscal and financial, also at work. The budget deficit was still very large, even though not so much higher in relation to output than in other countries of the Organisation for Economic Co-operation and Development (OECD). However, given the low rate of personal savings, that deficit required external financing on a large scale, which was becoming increasingly difficult to achieve without a rise in interest rates. Moreover, financial institutions in USA were subject to considerable strains: they found themselves over-committed in bad loans; and the collapse of the Savings & Loans institutions was putting the entire financial system in jeopardy, while adding to the budget deficit.

Following the huge rise in oil prices after the Organization of Petroleum Exporting Countries (OPEC) decided in July 1990 to establish a benchmark of \$22 a barrel, and then the invasion of Kuwait by Iraq on 2 August 1990, economic prospects took a turn for the worse. From September onwards, oil prices per barrel rose rapidly, reached some \$40 at one point and averaged \$30.0 for the second half of the year, compared to \$16.18 in the second quarter — which had been an increase of 22.4 per cent compared to the second half of 1989.

Estimates of the growth of the world economy in 1990 prepared by the Department of International Economic and Social Affairs of the United Nations (DIESA), by the International Monetary Fund (IMF) and by OECD concurred in showing much less growth than in 1990. DIESA estimated the annual percentage growth of output at 4.3 in 1988, 2.9 in 1989 and only 1.0 in 1990 (see table I.1 below). All economic groupings shared in the downturn: the corresponding figures for 1989 and 1990 are: developed market economies down from 3.3 to 2.8; and developing countries down from 3.2 to 2.5. The countries of Eastern Europe and the Union of Soviet Socialist Republics (USSR) suffered an actual fall in their

Table I.1
Annual growth rates of the World Economy (Percentage)

	1988	1989	1990	1991 a/
Developed Market Economies	4.3	3.3	2.5	1.8
United States	4.4	2.5	1.0	0.7
Western Europe	3.7	8.4	2.8	2.2
Japan	5.8	4.9	5.5	3.5
Developing Countries	4.3	3.2	2.8	2.5
Developing Africa b/	2.1	3.3	2.6	3.3
South and East Asia	8.5	5.8	5.8	5.5
Western Asia	0.2	1.4	0.0	0.0
Western Hemisphere	0.5	1.1	-0.5	1.5
China	1.4	4.0	4.0	5.5
Eastern Europe and USSR	4.0	1.2	-6.0	-4.0
World output	4.3	2.9	1.0	1.2
World trade volume	9.1	7.3	5.4	5.3

Source: United Nations, DIESA, 17 December 1990; IMF, World Economic Outlook, October 1990; OECD Economic Outlook, December 1990.

a/ Forecast

b/ ECA Secretariat estimates

combined output of 6 per cent in 1990, due to the problems of their transition to a market-type economy.

Within the grouping of developed market economies, the recession affected USA and the United Kingdom of Great Britain and Northern Ireland more than Japan and Germany, which OECD estimated in December 1990 to have grown that year by 3.7 per cent and 3.0 per cent, respectively, compared to an average of only 2 per cent for the members of OECD as a group. Later estimates confirm that those two economies maintained a strong growth momentum into early 1991. In Germany, the considerable reconstruction and restructuring needs entailed in the integration of the former German Democratic Republic provided a very strong stimulus to demand.

In the groupings of developing countries, while the Western Hemisphere (Latin America and the Caribbean) and Western Asia have been seriously affected by the world recession, South and East Asia appears to have maintained its expansion: output grew by 5.8 per cent in 1990, the same rate as in the preceding year. In China, the growth of the economy slowed down considerably to only 4 per cent in 1990, but that was mainly the result of deliberate action by the Government to rein in an overheated economy.

In Africa, the ECA secretariat estimates that output grew in 1990 by around 2.6 per cent, only slightly less than in 1989, despite the high oil prices which obtained after August 1990 and deeply affected the economy of the region. Taking the region as a whole, the loss of output suffered by oil importers was apparently more than counter-balanced by the gains which the oil exporters obtained.

B. World trade and commodity prices

World trade growth declined significantly, as was to be expected given the quasi-stagnation of world output: the estimated rates are 7.3 per cent for 1989 and 5.3 per cent for 1990. It appears that the slowdown was more pronounced among the members of OECD than in nonn-OECD countries. The trade flows of developing countries were inevitably affected by the higher oil prices: import volumes grew only slightly, because the oil-importing countries reduced their non-oil imports; on the other hand, exports reflected the higher level of both production and exports of oil after the suspension of OPEC quotas in October 1990. Oil-exporters did not raise their imports substantially in that year, however, on account of their generally difficult circumstances. Not until 1991 was a significant import response to their enhanced export revenues expected to show up.

There was a substantial rise in international trade prices as a result of higher inflation in industrialized countries and the higher oil prices which obtained after August 1990. According to the latest IMF data¹, the export prices of industrialized countries rose by 5.5 per cent in the second quarter of 1990 compared to the corresponding quarter of 1989, while they had remained virtually unchanged during 1989. According to the dollar-based index of the United Nations², the prices of manufactured goods exported by developed countries likewise remained stable in 1989 but increased — by 8.3 per cent — in 1990; the trends in commodity prices were entirely different, however: according to the IMF index, if crude oil and other hydrocarbons are excluded, those prices fell on average by 7.9 per cent in 1990³. On the other hand, the United Nations index⁴ with similar commodity coverage remained stable for the export prices realized by developing countries but indicated that, in the context of world trade as a whole, prices increased by 4.4 per cent. Chapter IV below provides a detailed

discussion of the trends in trade. It is fitting to note here, however, that commodities such as coffee, cocoa and tea, which are of crucial importance in the exports of African developing countries, were particularly affected.

In oil-importing countries, the balance on current account generally worsened in 1990; and the developing countries among them were further hurt by the unfavourable trends in commodity prices. Remarkably, in USA the deficit in that balance shrunk somewhat due to a favourable export performance, in marked contrast to the reduction of a surplus in both Japan and Germany. For the members of OPEC as a whole, the balance swung back from a deficit in 1989 to surplus in 1990. Deficits widened generally in developing countries, including those in Africa. While the four Asian newly industrializing countries (NICs) still registered a consolidated surplus on current account, in Korea the balance became a deficit for the first time since 1986.

Estimates for the African region show that while exports rose substantially both in volume and value in 1990, imports stagnated in volume but increased marginally in value. The provisional estimate of \$5.3 billion for the current-account deficit would be a considerable improvement on the \$12 billion estimated for 1989.

The Uruguay Round of negotiations in the framework of the General Agreement on Tariffs and Trade (GATT) floundered on 7 December 1990 in face of the issue of farm policies in the European Economic Community (EEC). High hopes had been placed on those trade talks, which for the first time included services as well as goods and were designed to result in a further liberalization of world trade. In recent years, limitations on free trade have multiplied and the possibility of international trade becoming polarized into regional blocs such as EEC has become more likely. The EEC's Common Agricultural Policy, which provides very high support to agriculture and virtually excludes farm imports, is a matter of particular concern to countries such as Argentina, Australia, New Zealand and USA, which rely to a great extent on their exports of farm produce.

Moreover, the high farm prices in EEC make for lower prices on international markets [You might amplify this remark.] and act, therefore, as a substantial

1 *International Financial Statistics*, vol. XLIV, No. 10 (October 1991).

2 *Monthly Bulletin of Statistics*, vol. XLV, No. 3 (March 1991).

3 *International Financial Statistics*, vol. XLIV, No. 40 (October 1991).

4 *Monthly Bulletin of Statistics*, vol. XLV, No. 8 (August 1991).

disincentive for the agricultural sector in developing countries. The collapse of the Uruguay Round would, in addition, lead to USA promoting so-called "fair trade" policies which would severely damage world trade and possibly result in a world-wide recession of the 1930s type.

The negotiations did continue after December 1990, however, and formal talks were resumed in February 1991. The vital interest of developing countries — not least those of the African region — in strengthening and expanding free trade cannot be too strongly stressed. Furthermore, it would be of considerable import for the world as a whole were the EEC farm subsidies to be reduced or their modus operandi changed. And consumers in EEC would be among the first to benefit from such measures.

C. Financial flows

A disturbing characteristic of the current economic slowdown has been the magnitude of the fall in prices on financial markets and the growing problem of bank liquidity. The bear market saw percentage declines of 7.5 on Wall Street, 11.8 in London, 37 at Tokyo, 26.2 on the Bourse in Paris and 27.6 on the Frankfurt market. Declining economies, rising inflation, higher oil prices and war fears in the wake of the United Nations embargo on Iraq all played their part, though in the case of Japan the crash in property values was an important factor. The changes in interest rates also influenced the markets: downward in USA to sustain the economy, upward in UK and Germany to control inflation.

Banks in USA found themselves burdened by a considerable volume of "non-performing" loans, which they had made variously to Governments of developing countries; to corporations for the purpose of engaging in mergers and other stock-market operations; and to those engaged in the construction of property. The economic slowdown hit the property market especially hard: values tumbled and bank assets were directly affected. While the banking system cannot be said to be insolvent, an important element, the so-called "thrifts" (Savings and Loan institutions) has collapsed and the Federal Government had to take over the protection of depositors at considerable cost.

The liquidity "crunch" in USA coincided with the emergence of large financial needs in the developing countries and in Eastern Europe. In view of the relatively low rates of saving in the industrialized countries, there is a worldwide shortage of investment

funds — though that assertion must be qualified, having regard to the dimensions of the capital flight from developing countries.

The debt problems of the developing countries persisted in 1990, despite the various initiatives taken to find a solution. According to IMF, their debt increased by 5 per cent to reach \$1,303 billion at the end of 1990⁵; and the proportion of official debt in that debt has risen steadily, reflecting reduced private-sector lending and the debt-reduction operations undertaken by commercial banks. The latter activity is now firmly established as the main strategy to be employed, but it is made conditional on the adoption by the target countries of rigorous structural adjustment programmes. That factor limits the usefulness of the Toronto Plan for African countries, even though the Governments of some members of OECD, such as France, Canada and Germany cancelled the debts of some of them during 1990.

While developing countries still suffer under a heavy burden of debt, the same issue now looms large for the countries of Eastern Europe, which incurred heavy debts during the period preceding their switch away from centralized planning. Poland and Bulgaria, for example, are unable to repay their obligations. In the case of Poland, the debt amounts to nearly \$40 billion and the Government has pressed for its outright cancellation or at least a programme of rapid and substantial reduction. The consequential difficulties that such a solution would create for the developing countries are evident.

While developments on the debt front have been disappointing, there has been a turn for the better in the trend of net resource flows to developing countries. OECD data show that those flows increased again in 1989, for the third year in succession, rising to \$110 billion. That was 4 per cent more than in 1988 in both current dollars and in real terms. There was no significant change in the structure of the flows: the bulk of the resources was provided by Official Development Assistance (ODA), which totalled \$69 billion in 1989; and private flows recorded a slight fall, following an increase in 1988. Given the heightened financial needs of developing countries in 1990, particularly after the rise in oil prices, and the anticipated increase in their debt stock, it is almost certain that resource flows increased once again in 1990.

5 IMF, World Economic Outlook, (Washington DC, October 1989).

D. Short-term prospects

Forecasts by international organizations for the following year customarily appear around the end of the current year. Those for the year 1991 were therefore made at a time when the possible outbreak of the Gulf War was still in an uncertain future and when average oil price levels in 1991 were envisaged as likely to be near \$26 per barrel or even higher. On that basis, DIESA projected a continuation of the recession during 1991 and the world economy growing by a mere 1.2 per cent. In developed market economies, growth was expected to be less than in 1990 — only 1.8 per cent instead of 2.5 per cent — and in USA no more than 0.7 cent, though both Japan and Germany were to escape the recession. In the developing countries, output growth was to decline yet again, to 2.5 per cent and hence below the population growth rate, although there would be a slight recovery in the Western Hemisphere and the countries of South and East Asia would continue their expansion at a commendable rate (5.5 per cent).

The forecasts by DIESA, as well those made by IMF and OECD, correctly assumed a rapid conclusion of the Gulf crisis. Where they erred was about the course of oil prices: contrary to expectations, prices declined rapidly and by the end of February 1991 had fallen to around \$17-18 a barrel. That meant, on the one hand, that oil-exporting countries would not receive the related high revenues and, on the other hand, that oil-importing countries would not face a renewed shock from high oil prices. However, the forces which caused the slowdown are still at work, particularly in USA, where the budget compromise of 1990 between the administration and Congress has been translated into a significant increase in taxation. That has been compounded by the added (extra-budgetary) costs arising from the collapse of the Savings and Loan institutions and by the burden of complying with new

environment protection legislation which will not make any contribution to stimulating the economy.

The fragile situation of many banks, which is described above, is an element that causes concern when assessing the prospects for the world economy in 1991. The same may be said of the state of the Uruguay Round of GATT negotiations, since their failure could have extremely damaging consequences, especially for the developing countries as quite possibly the biggest losers from a renewal of protectionism.

While lower prices than anticipated are a disappointing prospect for those African countries which export oil, most national economies in the region will in consequence have more room for adjusting to a changing trade situation with those prices at a more comfortable level. Prospects for other commodity prices are not good, however, since recovery appears unlikely to come to the industrialized economies before the end of the year, so that demand will remain depressed.

Moreover, even though the evidence points to an increase in resource flows into the region, the level will remain well below what is needed. A fitting example is the latest Lomé Convention "Lomé IV"), signed on 19 December 1989, which provided benefits worth 12 billion ecus to the African, Caribbean and Pacific (ACP) group of former colonies of EEC countries and thus to all the countries of sub-Saharan Africa. Even though that sum was a substantial one, it fell appreciably short of what the African and Pacific member countries had requested, and EEC was quite adamant in rejecting any increase. Furthermore, not much relief is to be expected in the matter of the external debts of African developing countries, which means that the short-term prospects for the region are, at best, for a delayed and slow economic recovery.

II. THE AFRICAN ECONOMY IN 1990 AND THE PROSPECTS FOR 1991

A. The Overall Situation in 1990

Agriculturally, 1990 was a bad year, during which the return of famine to some areas and the oil shock of August 1990 combined to produce a significant slowdown in the economies of African developing countries (see the economic indicators in table II.1 below). The growth of GDP fell from 3.3 per cent in 1989 to only 2.6 per cent, which meant a further decline in per capita GDP — at 1980 prices, it was down 11 per cent to \$655 from \$734 in 1980. In current prices, per capita GDP in 1990 was only \$541, compared to \$1,065 on average for developing countries as a whole. Other factors played a role in the quasi-recession suffered by the region: they included the recession in industrial countries; the ensuing further decline in non-oil commodity prices, particularly those of beverages and minerals; and, to some extent, political turmoil, which exploded into civil war in Angola, the Horn of Africa, Liberia, and Mozambique.

Economic performance varied from country to country, but there was a sharp difference between, on the one hand, the oil exporters which benefited from the windfall created by the Gulf crisis and, on the other, the oil importers — the majority — which had to deal with an inflated oil bill, a poor harvest and the consequences of the recession in industrialized countries. While in oil-exporting countries the rate of GDP growth rose on average to 3.7 per cent in 1990 from 3.1 per cent in 1989 — it was 4.2 per cent among those of them who were members of OPEC — in oil-importing countries, the rate fell to only 0.7 per cent in 1990 from 3.4 per cent and 4.3 per cent in 1989 and 1988, respectively. The drought-affected countries were, of course, worse off: their collective GDP fell in 1990 by 3.1 per cent. The Sudan suffered a fall of 5.3 per cent, due to the severity of the famine in the southern and western parts of the country.

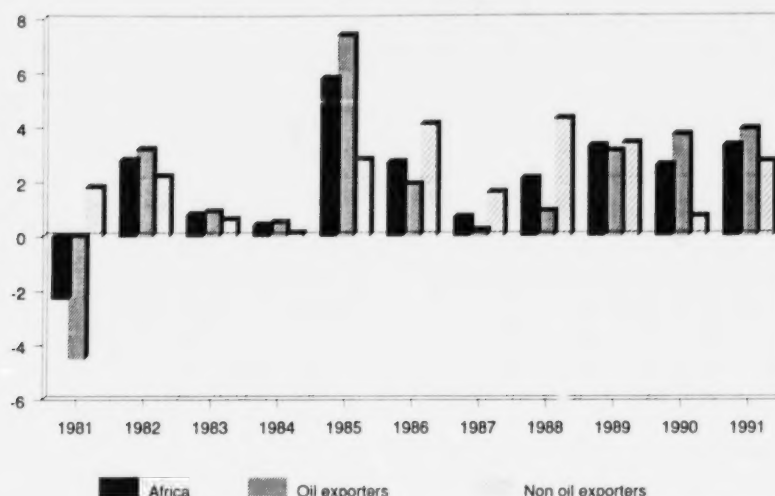
The recession was the most severe which sub-Saharan Africa excluding Nigeria had experienced: GDP growth in 1990 averaged 0.8 per cent — only 0.2 per

Table II.1
Economic Indicators for developing Africa, 1988-1991

	1988	1989	1990	1991 a/
Percentage growth of GDP at 1980 prices	2.1	3.3	2.6	3.3
Percentage growth of FAO index of agricultural production (base 1979-1981=100)	4.0	0.5	1.5	..
Oil production (million tons)	265.8	293.4	323.4	339.4
Percentage increase in consumer price index b/	26.8	31.9	14.4	35.8
Commodity Prices Index (1980=100), percentage growth	88.8	90.9	86.5	..
Oil prices (Brent crude, \$ per barrel)	15.0	18.2	24.0	20.0
Exports (billion dollars)	53.1	60.8	74.5	..
Imports (billion dollars)	65.9	67.2	75.6	..
Current account balance (billion dollars)	-14.7	-12.2	-5.3	..
Source: ECA Secretariat				
a/ Forecast				
b/ Weighted average (with national GDPs in 1980 as weights)				

Fig.1 : GDP growth rate, 1981-1991

1980 prices (percentage)



cent in the least developed countries and -1.2 per cent in the Sahel, where weather conditions are "normally" very unstable and were poor in 1990.

At the subregional level, the highest percentage growths in 1990 were recorded in North Africa (3.2 compared to 2.4 in 1989), owing to the inclusion of three major oil exporters, Algeria, Egypt and the Libyan Arab Jamahiriya, which benefited in varying degrees from the Gulf windfall. In West Africa, where Nigeria accounted for 74.7 per cent of subregional output (at constant 1980 prices), GDP growth (2.9 per cent) remained higher than the regional average. If Nigeria is excluded, however, the data show West African output falling slightly — by 0.5 per cent. In Nigeria itself, growth was 4.1 per cent. In Central Africa, despite the oil windfall, GDP grew by only 2 per cent, reflecting the difficulties of oil-exporting Cameroon and the Congo, in addition to the crisis in Zaire. East and southern Africa was the subregion worst hit by the rise in oil prices because it lacked domestic sources of crude oil and some countries were afflicted by drought and civil war.

The distribution of countries according to the rate of growth of GDP (see table II.2 below) shows a near doubling of the number of countries recording a negative growth of GDP, from only 8 in 1989 to 15 in 1990, while the number of countries with a growth rate exceeding 8 per cent was down to 2 only from 7 in 1989.

The trends in demand in general did almost nothing to stimulate the national economies, except in oil-exporting countries. Since government policies were applied for the most part in a context of fiscal retrenchment, as part of a reform and adjustment programme, there was a marked slowdown in the

Table II.2
Frequency distribution of countries according to growth rate of gross domestic product 1988-1991

	1988	1989	1990	1991 a/
Percentage increase:				
Negative	7	8	15	4
0 to less than 3	18	18	15	26
3 to less than 6	14	15	14	18
6 to less than 8	5	3	5	2
8 and above	7	7	2	1
Source: ECA Secretariat				
a/ Forecast				

growth of government expenditures throughout the region, which particularly affected wage bills and investment. The estimates available show that government consumption at the regional level remained practically stable in real terms, at least from 1988 onwards. Consumption by households, on the other hand, was depressed by the fall in real incomes — in particular, by the stagnation or contraction of government wage bills, which represented a large proportion of monetary income in most countries. The growth of household consumption in 1990 at the regional level was estimated at 2.4 per cent in real terms, while it was stagnant in current dollar-terms. In some subregions and countries, it actually declined. Such was the case in Central Africa, where available estimates show decline since 1988; in East and southern Africa; among the grouping of least developed countries (down 2.5 per cent); and generally in non-oil exporting countries (down 0.2 per cent). The contraction of real incomes and government consumption was felt mostly in some oil-exporting countries — the Congo, for example — where it produced unrest leading to the partial unravelling of

the adjustment process.

While there was no stimulus to consumption in 1990, there was some recovery in gross fixed capital formation (GFCF), which apparently grew by 5.1 per cent, compared to an estimate of 4.4 per cent in 1989. However, that trend was limited to a few countries, particularly the oil exporters. Elsewhere, the trend was less clear and the growth of investment remained modest, if not nil. There was not much scope for inducing recovery by fiscal means, since government policies were dominated by the need to adjust the economy, involving as a rule significant cuts in the growth of expenditure. As shown in chapter VI below, the fiscal stance of most Governments was rather restrictive, since they accorded priority to reducing fiscal deficits — which, in fact, were significantly cut, at least in terms of budget estimates.

B. The Oil Shock

As discussed in chapter VIII below, the invasion of Kuwait by Iraq in August 1990 and the resulting crisis which erupted into a war in January 1991 were the direct cause of the sharp rise in oil prices up to early January 1991. The sudden removal of both Kuwaiti and Iraqi oil supplies from the market and the fear that hostilities might seriously damage the oil wells there were the main reasons why the market drove oil prices up to \$40 a barrel by the end of September 1990. Most African oil exporters, particularly those with spare capacity, like Nigeria, benefited from the unexpected jump in revenues, which enabled them to relax the pressure on their balance of payments. Algeria, for example, while careful not to expand imports unduly, was in a position to ease its difficult financial situation, particularly its debt servicing. In the Libyan Arab Jamahiriya, where export revenues rose to \$11 billion, the windfall was used to increase investment and bring in consumer goods.

Oil-importing countries, however, were badly affected: their oil bill rose by 35 per cent to \$9.5 billion, equivalent to 2.8 per cent of regional GDP, while their export revenues were depressed by the fall in non-oil commodity prices. Though the oil shock proved to be short-lived — prices started to fall by the middle of January 1991 and continued to do so even when hostilities broke out — the consequences have lasted longer than anticipated and a full recovery is not expected before 1992. In some countries, such as Kenya, the islands in the Indian Ocean, Egypt and the Maghreb countries, the Gulf crisis led to a contraction in income from tourism, because of the fear of repercussions from hostilities, and income from migrant workers in the Gulf States was also hit. Egypt was particularly affected, losing revenues derived from tourism, migrant remittances, exports to the Gulf area

and Suez Canal dues.

The Gulf crisis has once more demonstrated the extreme vulnerability of African economies to external factors. That is a situation with which African countries will have to deal sooner or later.

C. Agriculture

The 1990 agricultural year was a poor one. The weather pattern was unfavourable in many areas, particularly in North Africa, the Sahel and East and southern Africa. In the Horn of Africa, drought struck in Somalia; in the eastern and northern provinces of Ethiopia; and in the Sudan, where it was extremely severe and a famine as dramatic as in 1984/1985 broke out. Other areas were affected by drought in the Maghreb and southern Angola. Civil war impeded agricultural activities in Liberia.

Although the situation was not in any way as bad as during the great famine of 1984/1985, agricultural production in the region grew by only 1.5 per cent. Cereal production declined, according to the latest figures published by the Food and Agriculture Organization of the United Nations (FAO), by a drastic 3.9 per cent. In the Sudan, the fall was 15 per cent, a catastrophe in a country where food availability is mainly determined by cereal supplies. At the end of 1990, FAO estimated that some 7.2 million people in developing Africa were threatened by famine. Though agricultural prospects have improved considerably ever since — the 1991 cereal crop was forecast at 84.6 million tons, roughly 10 per cent more than in 1990 — famine lingers on in areas such as the Sudan, where deaths from starvation have been reported.

The picture was not completely negative, however. In some countries, it is clear that the changes in agricultural policy of recent years are increasingly bearing fruit. In Egypt, where the Government substantially liberalized agriculture, the 1990 cereal crop reached 13 million tons, 15 per cent more than in 1989. In Ethiopia, it is reported that cereal production increased by as much as 20 per cent in areas not touched by drought. That was due to a great extent to the new agricultural policy adopted by the Government early in 1990, which practically abandoned "villagization" and allowed virtual free trade in agricultural products. Given the right policies, therefore, it is not in doubt that developing Africa can extricate itself from the long period of slump in agricultural production which started in the 1970s.

D. Commodity Prices

Oil prices have been discussed in section B above. On average the price of Brent crude rose by nearly 32 per cent compared to 1989. For non-oil commodities, however, particularly beverages and minerals, conditions on the world market were distinctly unfavourable. Recession in industrialized countries sharply reduced demand. The downturn was aggravated by the glut of supplies on the markets for coffee and cocoa, which had already collapsed in 1989. In 1990, it was mainly the markets for metals and minerals which were affected by the recession in industrial countries. The price of nickel, for example, which had more than doubled in 1986-1988, fell by 33.4 per cent in 1990, while copper prices went down by 6.5 per cent.

Coffee and cocoa prices were at 15-year lows. In US cents per lb, Ugandan coffee that had been traded at 148.32 in 1986 fetched only 54.99; and cocoa fetched 57.52 compared to 93.82 in 1986 (annual average prices). There were, of course, major direct consequences for the countries which depended on beverages for their export revenues. According to the Government's 1991/92 Economic Survey⁶, the value of coffee exports from Uganda was equivalent to only \$178.7 million in 1990/1991 compared to \$393.5 million in 1986/1987; and in Côte d'Ivoire, the largest producer of cocoa in the world, exports were reported at \$3,120 million in 1990, compared to \$2,808 million in 1989 — in local currency terms, CFA 849.5 billion in 1990 compared to a peak of CFA 1,381 billion in 1985, a fall of 38.5 per cent. As a group, beverage exporters of the region achieved no output growth in 1990 but rather a marginal decline compared to a rise of 3.2 per cent in 1989. The economy of Côte d'Ivoire has been in recession at least since 1987, when there was a large fall in world beverage prices; and in 1990 its output fell for the fourth successive year.

The prices of agricultural raw materials in 1990 were not more favourable than those of other commodities. It is true that cotton prices rose by about 9 per cent, because of growing demand for cotton world wide. Even so, prices for some types of Egyptian cotton fell in 1990.

The price of logs fell for the second year in a row since 1989 on a market where African exports face stiff competition from Asian suppliers.

Even with war in the Gulf and a perceived threat to oil supplies, the price of gold, at around \$383.50 an ounce, failed to rise in 1990, a fact which probably reflects a less important role for gold than its historical one of a store of value.

E. The Resource Balance

If resources are measured at constant prices, there appear to have been few changes in their balance in 1990 (see table II.3 below). Imports provided 18 per cent of total resources. Among the uses of resources, expressed as a percentage of GDP, government consumption fell slightly to 14 compared to 15 in 1989, private consumption was steady at 61 and GFCF at 15. As a result, there was a net resource surplus of 9 per cent in 1990 compared to 8 per cent in 1989; and domestic savings were unchanged at 24 per cent.

The data presented in the above table do not take into account the large losses arising from adverse changes in the terms of trade since 1980 (the base year for the

Table II.3
Developing Africa: resource balance, 1988-1989 (billion of dollars at 1980 prices)

	1988	1989	1990	1991
GDP	378.5	390.8	401.0	414.1
Imports	81.2	85.6	88.1	91.8
Total resources	459.7	476.4	489.1	505.9
Government consumption	58.0	57.8	57.7	58.0
Private consumption	231.3	239.6	245.3	252.6
Gross fixed capital formation	54.3	56.7	59.6	62.8
Stock changes	2.8	4.4	3.2	4.1
Exports	113.3	117.8	123.3	128.3
Total uses	459.7	476.3	489.1	505.8
Domestic demand	346.4	358.5	365.8	377.5
Resource gap	32.1	32.2	35.2	36.5
Domestic savings	89.2	93.4	98.0	103.5

Source: ECA Secretariat estimates and forecasts

constant prices) — in particular, the fall in prices of oil and other export commodities at a time when import prices rose substantially. At current prices, there was a net resource gap of nearly \$10 billion (3 per cent of GDP) in 1990 compared to around \$12 billion (3.8 per cent of GDP) in 1989. That significant improvement was the direct result of the oil windfall from the Gulf crisis, which produced a considerable

⁶ Background to the budget, 1991-1992, June 1991, Ministry of Planning and Economic Development, Kampala, Uganda

rise in revenue for the exporting countries. Provisional balance-of-payments data indicate a comparable contraction in the current-account deficit of the region from \$12.2 billion in 1989 to \$5.3 billion in 1989 (in current dollars).

At current prices, domestic savings represented only 17.3 per cent of GDP in 1990, a proportion unchanged from 1989 (see table II.4 below). It is important to note the decline since 1980, when they had represented 24.6 per cent of GDP. Those regional averages conceal large variations among countries and economic groupings. While the proportion was approximately 18 per cent in oil-exporting countries in 1990 (32 per cent in 1980), it was only 13 per cent in non-oil exporting countries (11 per cent in 1980), 6.6 per cent in the least developed countries (4.5 per cent in 1980) and 18 per cent in sub-Saharan Africa (in 1990 and 1980). It was therefore the contraction of savings in the oil-exporting countries which was mainly responsible for the fall in the regional percentage.

Oil-exporting countries had achieved substantial rates of both savings and investment until the price collapse of 1986. In Algeria, for example, the ratio of

investment to GDP was 38.2 per cent in 1980; and although it declined it was still nearly 30 per cent (at current prices) in 1990. That investment effort did not produce commensurate gains in real output, however: the Algerian economy grew by a mere 2.5 per cent a year in real terms in the period 1980-1990.

In Nigeria, investment collapsed in 1990, in volume terms, to only 42 per cent of its 1980 level. The causes were: the drastic fall in oil revenues; the fact that Nigeria could not draw on foreign resources when its debt became unmanageable; and the necessity for the country to have an external surplus to pay for debt service, which meant that imports had to be reined in.

Even though the experience of the 1980s showed that a large volume of investment did not necessarily result in growth of output — that optimal use of investment resources was as important as their level — a higher level of savings and therefore of investment is a fundamental condition for African developing countries to grow out of the present crisis. On the basis of current estimates, it would seem that investment has been slightly on the increase once again, though by no means uniformly. Adjustment and reform policies required public investment to be cut — not necessarily a bad trend, however, given the dismal performance of public enterprises in the last decade. Presently, in some West African members of the African Financial Community (CFA), public construction activities have come to represent the major investment projects, a not very encouraging development. Moreover, it could be that too large a proportion of investment in developing Africa is devoted to oil prospection and development. Such activities were stepped up in many areas, particularly among the oil-exporting countries, some of which modified their laws and regulations to promote foreign investment and to encourage co-operation with foreign oil companies. Such was the case in Cameroon, where government policy had tended to discourage the search for additional reserves.

In any case, foreign investment in developing Africa did not revive. According to the Organisation for Economic Co-operation and Development (OECD)⁷, net resource flows have remained more or less stagnant in volume since 1985 and, while public flows

Table II.4
Resource balance of developing Africa, 1988-1990
(billions of current dollars)

	1988	1989	1990
GDP	348.0	322.1	320.9
Imports on goods and services	98.3	96.7	108.9
Total resources	446.3	418.8	429.8
Government consumption	56.5	51.8	54.8
Private consumption	231.9	214.7	209.5
Gross fixed capital formation	72.3	65.3	65.7
Stock changes	2.3	2.6	0.5
Exports	83.4	84.4	99.3
Total uses	446.3	418.8	426.8
Domestic demand	363.0	334.5	330.5
Resource gap	-14.9	-12.3	-9.6
Domestic savings	59.6	55.6	55.6

Source: ECA Secretariat

7 Financing and External debt of developing countries, 1989 Survey (OECD), Paris, 1990).

increased, private ones slumped in 1990 to only \$2.5 billion. In 1989, a year for which more complete data are available, direct investment was only \$1.1 billion and net international bank loans were a negative \$1.6 billion.

F. Foreign Debt and Finance

Estimates of the foreign debt of developing Africa are discussed in chapter IV below, the overall conclusion being that the debt burden increased further in 1990, despite the very considerable relief obtained by Egypt (at least \$15 billion). All indicators of that burden — the ratios of debt to GDP, to GNP and to exports, as well as the ratio of debt service to exports of goods and services — show that developing Africa was the most heavily indebted region in the world, though the share of its debt in the total debt of developing countries remained small (19.4 per cent in 1989). It has also become increasingly clear that the present level of debt service — around 30 per cent of exports of goods and services — is much too high, given the limited capacity to pay of most countries of the region and the state of economic crisis in which practically all of them find themselves.

Creditor countries have come gradually to realize that the adjustment-cum-debt-repayment strategy followed since the early 1980s has failed to produce the expected results and that debt reduction must be a fundamental element of any programme for debt relief and structural adjustment. However, despite the launching of the Toronto plan, followed by the Dakar initiative and the proposals made by the British Prime Minister John Major (see chapter IV below), there has been no new development of a decisive nature. Creditors still make any relief conditional on the adoption by the countries concerned of an adjustment programme sponsored by the World Bank or IMF, although those two bodies themselves recognize that they were mistaken in their rigid advocacy of formulas of quasi-instantaneous transition to a free-market economy.

At the same time, other events have combined to show that a substantial reduction of the debt of African countries was not only in the realm of the possible but could also be easily absorbed by the economies of the members of OECD. It may suffice to mention the large concessions made to Egypt by the United States of America on military debt and, on the other elements of debt, by the Paris Club of official bilateral creditors and by the London Club with regard to commercial debt, as well as the favourable terms granted to East European countries such as Poland.

As discussed earlier, net resource flows to developing Africa remained more or less stagnant in volume, with

a virtual collapse of foreign private investment. In the situation created by the transition of East European countries towards free markets, the provision of additional financial resources for the region appears to be in jeopardy. It is therefore a matter of concern that the group of countries in the region which have benefited from the best financial environment since they achieved independence, the CFA members, experienced such financial difficulties in 1989-1990. While the majority of countries in the region were hit by severe inflation and hindered by the possession of inconvertible currencies, the CFA members enjoyed a stable currency, guaranteed by the Treasury of France and therefore freely convertible into the French franc at a fixed rate. Moreover, CFA regulations ensured that no member country could resort to deficit financing. Despite those advantages, the banking sector became insolvent in some CFA countries, particularly Benin; and some banks, for example, the Banque Internationale pour l'Afrique Occidentale (BIAO), were closed by the authorities because a considerable proportion of their loans were irrecoverable. The operation necessitated strong support from the French Government and from the monetary authorities. The result was an appreciable liquidity squeeze in some CFA countries — the Congo, for example, and even Senegal.

With the approach of further steps to create a single European market, the question is being raised with some disquiet whether the CFA arrangements will survive when France shares a single currency with its European Community (EC) partners. Despite the assurances given by the French Government and the modest cost involved — the CFA zone has been in surplus for most of its existence — it would seem that a change in the fixed parity of the CFA franc to the French franc should be expected.

G. Inflation

Inflation, as measured by consumer price indices, appeared to have abated in the region during 1990, though still remaining relatively high. Adjusting the country data to give 1980 = 100 in each case, the regional average rate of inflation was 14.4 per cent in 1990 compared to 31.9 per cent in 1989. It is important to note here that the figures published in *International Financial Statistics* (IMF, monthly) are not strictly comparable to the estimate calculated by the ECA secretariat, because they exclude Egypt and the Libyan Arab Jamahiriya and include South Africa, which is not part of the region. Nevertheless, the IMF calculations and those of ECA are in broad agreement, in that they show the same trend towards a lower rate of inflation in 1990. The IMF data indicate, moreover, that inflation was considerably less than in developing countries belonging to the Western Hemisphere

(mainly Latin America), where it reached 522.1 per cent, or those in Europe, where it was 216.6 per cent.

The lower rate of inflation than in other developing regions was largely due to a lower rate of monetary expansion in Africa, where a significant number of countries are CFA members. Monetary growth in the region slowed down significantly in 1990, as shown in chapter VI below. According to IMF, that expansion⁸ was 14.6 per cent in Africa in 1990 compared to 20.3 per cent in 1989 and 22.3 per cent in 1988. The lower rate of inflation resulted above all from very low rates in CFA countries, where the authorities considerably reduced the rate of money creation as part of structural adjustment programmes, and in particular from the restructuring of their banking sectors. Negative percentage rates of inflation were achieved in Burkina Faso (0.5), Côte d'Ivoire (0.7) and the Niger (0.8). The rate was zero in the Central African Republic; and negligible positive percentage rates were achieved in the Congo (2.3), Chad (0.6) and Equatorial Guinea (1.1). In Nigeria, the policy of monetary restraint — which included the maintenance of high interest rates and the reduction of the budget deficit — led to a fall in the inflation rate from 50.5 per cent in 1989 to a more manageable 7.5 per cent in 1990.

In Algeria, inflation resulted from price deregulation and money depreciation (the Government allowing the dinar to depreciate without a formal devaluation), as agricultural prices were freed and public enterprises

were allowed to fix prices according to market considerations. Inflation was stated to have risen from 9.3 per cent in 1989 to 16.7 per cent in 1990. In fact, was much higher, since official price calculations did not take into account all relevant transactions: non-official transactions represented a significant part of consumption.

In Ghana, the authorities seem not to have succeeded in restraining inflation: it stood at 37.3 per cent in 1990, significantly higher than in 1989 (25.2 per cent). The situation worsened even more seriously in Sierra Leone, where the inflation rate nearly doubled to 111 per cent in 1990 from 62.8 per cent in 1989. Similar conditions prevailed in the Sudan, aggravated by the food shortage caused by the poor crop in 1990. Deficit financing continued to be the main engine of accelerating inflation in that country. In Liberia and Somalia, where the central authorities collapsed as a result of civil war, conditions of hyper-inflation prevailed and the currency ceased to have any purchasing value. In Zaire, the rate of inflation on a 12-month basis fell from 104.1 per cent in 1989 to 81.3 per cent in 1990 but rapidly accelerated to nearly 180 per cent in the last quarter of the year and to 441.4 per cent in the first quarter of 1991. The contraction of the economy during 1990 and the massive money creation are the obvious explanation of those developments.

⁸ Money supply as the sum of currency outside banks and demand deposits; see *International Financial Statistics*, vol. XLIV, No. 10 (October 1991).

In Uganda, on the other hand, considerable progress was achieved: inflation fell to around 30 per cent in 1990 compared to 90.2 per cent in 1989, 183.6 per cent in 1988 and even higher rates in earlier years.

H. Prospects for 1991

The external environment evidently played a considerable role in determining the economic fortunes of the region in 1991, in view of its dependence on external factors. By the time this Survey was being written, the Gulf war had ended and it was already clear that oil prices were unlikely to exceed \$20 a barrel during most of the year. The expected oil shortage had not materialized and, despite the considerable damage done to oil installations in Kuwait, prices had remained during April and May below the \$20 dollar mark, having started to decline early in January. It was therefore assumed for the preparation of forecasts that oil prices would average around \$20 a barrel in 1991 and hence that African oil-exporting countries would not benefit in 1991 from a windfall, as they had done in 1990. However, production is not expected to decline substantially but rather to increase to about 340 million tons or roughly 5 per cent more than in 1990.

The policies which Governments follow constitute a fundamental factor in the assessment of prospects, because they create the environment in which economic activities are carried out. Since reform and adjustment programmes are under way in most countries of the region, the key question is: what will be the impact of those programmes on the respective economies? A survey of various countries showed that in most cases the situation was still one of transition. The reform programmes were not yet fully in place and enterprises were still having to adapt to the new rules which those programmes introduced. That was particularly true of the enterprises in the public sector which have either been privatized or been given new management structures. Another important element is that the measures introduced continued to fall substantially short of what had been announced. For example, in Zambia, despite several reform programmes, agricultural prices and particularly those for the key maize crop were not yet at levels remunerative to the producer: i.e., the subsidy element for urban dwellers had not yet been removed. In other cases, the reform programme had more or less run aground because of its immediate, adverse impact on the jobs and incomes of wage earners, particularly civil servants. In the Congo, for example, once

democratization measures had been introduced, popular pressure brought about the abandonment of key elements in the adjustment programme: the Government resumed the hiring of graduates and granted considerable pay rises to civil servants. Despite those contrary trends, the reform programmes seem to have had a clear and positive impact on agricultural production across the region, leading to substantial improvement whenever weather conditions were favourable.

Accordingly, it was assumed that agriculture would perform much better region-wide in 1991. In 1990, the overall performance had been mediocre: serious drought and food shortages in the Horn of Africa and the Sudan; drought also in the Maghreb countries; and civil war in Angola, Liberia and Mozambique leading to food shortages. Early results in 1991 showed a strong improvement and above-average cereal crops in North Africa, good prospects in the Gulf of Guinea area and favourable conditions in Central Africa generally. The situation in East Africa, especially in the Horn of Africa, remained uncertain and in southern Africa prospects were mixed or poor. Nevertheless, FAO forecast better cereal crops for developing Africa in 1991 than in 1990⁹.

The foregoing considerations were the basis for a forecast of 3.3 per cent growth in real output in developing Africa in 1991, an improvement on 1990 of 0.7 percentage points. That carried the implication that output per head would at least not fall, on average. Value added in agriculture, which grew by only 1 per cent in 1990, was expected to rise by 2.5 per cent — a substantial improvement but still insufficient to match population growth. Oil output was expected to grow. The output (value added) of the mining sector was expected to grow by 5.1 per cent, despite the far from good situation in major producers such as Zaire and Zambia. That outcome would be less than in 1990 (by 7.5 per cent). Though the manufacturing sector performed very poorly in 1990 — value added grew by only 1.6 per cent — growth of 3.8 per cent was expected in 1991. A better agricultural season would improve the supply position, while higher growth should be translated into stronger demand for industry.

Table II.5 below presents details of the forecast share in GDP in 1991 of the subregions and some economic groupings, together with estimates of their growth rates in that year.

Oil-exporting countries should experience a growth of output of nearly 4 per cent, a slight improvement over

9 FAO, *Food Outlook* (Rome, September 1991).

Table II.5
Output share and growth rate by subregion and economic grouping, 1988-1991*

dollars	Per capita output in dollars	Percentage share of regional output 1990	Percentage growth		
			1989	1990a/	1990b/
North Africa	1135	54.0	2.7	3.2	3.4
Sub-Saharan Africa c/	340	48.9	3.9	1.9	3.1
Central Africa	500	10.4	0.9	-1.1	3.4
East Africa	279	17.3	3.7	1.0	2.4
Southern Africa	374	9.5	3.4	1.2	3.3
West Africa	339	18.3	4.5	2.9	3.7
The Sahel	379	6.9	6.2	-1.2	2.4
Sub-Saharan Africa excluding Nigeria	385	43.8	2.9	0.8	2.3
Least developed countries	219	15.2	5.2	-0.2	2.5
African Financial Community d/	593	13.9	0.6	1.3	2.3
Oil-exporting countries	812	61.0	3.1	3.7	3.9
Non-oil exporters	350	39.0	3.4	0.7	2.1
Minerals exporters	381	7.9	3.1	0.0	1.7
Beverages exporters	246	13.0	3.2	0.0	0.9
Developing Africa	524	100.0	3.3	2.6	3.3

Source: ECA Secretariat

* Per capita GDP and output share in 1990 measured in current prices, growth rate measured at 1980 prices.

a/ Preliminary estimates.

b/ Forecast.

c/ Including the Sudan, which forms part of the North African subregion

d/ African countries belonging to the CFA Franc Zone.

1990, despite the lower oil prices expected in 1991. As already noted, oil production is expected to continue to increase. The boost imparted by higher export revenues in the second half of 1990 should result in increases in imports and investment. A strong improvement is also expected for non-oil exporting countries, because of a better agricultural year and moderate oil prices. Their output should grow by 2.1 per cent, compared to 0.7 per cent in 1990. It has to be noted that some countries in the grouping are experiencing a severe economic crisis (Zaire, for example) and that in others civil strife has reached a level which will result in a performance significantly lower than could otherwise be expected.

It is forecast that practically all subregions and economic groupings will experience a slight recovery in 1991, as shown in the above table. GDP in the least developed countries, which suffered a slight recession in 1990 (output falling by 0.2 per cent), should grow by 2.5 per cent, because rains are expected to be more plentiful in the Sahel and the Horn of Africa. In sub-Saharan Africa, output should grow by 3.1 per cent compared to 1.9 per cent in 1990, while in North Africa the rate should, as in 1990, be slightly more than 3 per cent.

Mineral-exporting countries¹⁰ which experienced a complete stagnation of output in 1990, are expected to perform poorly in 1991: a growth rate of output of only 1.7 per cent. The mining sector is expected to grow by a mere 0.1 per cent, having declined by 4.3 per cent in 1990. For countries dependent on beverage exports, the situation will remain critical: a growth rate of under 1 per cent is expected in 1991, after stagnation in 1990.

Budget expenditures and consumption generally are not expected to provide much stimulus to the economies of the region. Fiscal policies are mostly oriented towards reducing deficits and therefore do not give much scope for a recovery driven by public consumption — which is forecast to increase by only 0.6 per cent in 1991 (a higher rate, however, than the -0.2 per cent estimated for 1990). Private consumption is expected to recover, growing by around 3 per cent compared to 2.3 per cent in 1990. GFCF is expected to grow by 5.5 per cent, maintaining the positive trend observed since 1989. Those predictions do not add up to a demand-led recovery, in view of the modest overall result which is forecast. Supply and current-account constraints in the region are in any case such that there is not much room for

10 Countries where exports of non-fuel minerals exceed 50 per cent of total exports.

demand stimulation. Exports are expected to grow at a slightly lower rate than in 1990: 4.1 per cent compared to 4.7 per cent, but the volume of imports should again decline (by 2.2 per cent).

It is worthwhile to compare the prospects described above with forecasts made by other international bodies. IMF projections, as already mentioned, are based on a different geographical coverage. However, they do broadly agree with the picture painted by ECA: they indicate a slight recovery in 1991, output growing by 2.0 per cent in 1991 compared to 1.9 per cent in 1990 and 3.3 per cent in 1989. The IMF forecasts for sub-Saharan Africa are more interesting, in that they relate to a grouping which excludes Nigeria, as do those of ECA. There is little to choose

between the two sets of growth percentages: both forecast 2.3 for 1991; IMF gives 1.5 and ECA 0.8 for 1990; IMF gives 2.3 and ECA 2.9 for 1989.

Having regard to the imperfections of statistical data in the region and the uncertainties of the world economic and political environment, the forecasts presented in the preceding paragraphs are fraught with a substantial margin of error. They do seem, however, to predict at least the general trend and the order of magnitude of what will actually happen. As the forecasts imply, even with a net improvement in 1991, the situation will remain deeply unsatisfactory: the region will not yet have overcome its crisis; and it will not yet have made a firm start on the path of development.

III. CHANGES IN MACRO-ECONOMIC POLICY

A. The Background of the 1980s

During the 1980s the Governments of African developing countries actively searched for ways to emerge from the crisis which affected their economies. In many cases, balance-of-payments and debt-servicing difficulties forced them to do so. In that situation, they had to turn to IMF for stand-by credits and support in debt rescheduling, which entailed accepting a package of policy measures now known as a structural adjustment programme (SAP).

The World Bank was also asked to assist and, in turn, introduced its own variant of adjustment. Both IMF and the World Bank presented a set of measures intended to effect a structural change in the economies concerned within a free-market framework. It was thought that by eliminating subsidies and other controls, thus allowing prices to settle at their market level, by devaluing currencies against the dollar and other major currencies, by privatizing public-sector enterprises and by reducing government intervention in the economy, the right mix of incentives would be provided, economic growth would be resumed and the external balance would be restored.

While the reform movement gathered momentum in the region, free-market ideas enjoyed a strong revival in the world at large. In developed market economies, the successive oil shocks and the ensuing recession had led Governments to reduce the burden of taxation on individuals and enterprises; to allow interest rates to rise as a way of fighting inflation and attracting investment; to dismantle parts of the public sector and sell it to the public — as was done in France and the United Kingdom of Great Britain and Northern Ireland; and, in general, to restructure their economies to give more play to market forces. That tendency received a considerable boost when Eastern European countries started to make radical changes in their economic structure and to move towards a free-market or mixed economy.

Thus, the free market emerged as virtually a new economic paradigm for development. That necessarily had a profound impact on African countries where,

for a long time, planning in its different variants had been held to be the main tool for development. In that context, the long-term development targets and strategies contained in the Lagos Plan of Action for the Economic Development of Africa¹¹, adopted by Heads of State and Government in 1980, were either at variance with or were ignored by the SAPs.

B. The Experience of the Structural Adjustment Programmes

However, the SAPs quickly ran into difficulties and their implementation was less than optimal. The difficulties centred mainly around four issues, as discussed below.

1. Subsidies

Even if it was true that subsidies to lower food prices entailed a transfer from the farming population to the urban one, their removal had or threatened to have grave social consequences: large sections of the urban population had come to rely on them and would be exposed to greatly increased food prices. In some countries, the removal of subsidies was the immediate cause of violent disturbances, which often led to the suspension of SAPs.

2. Devaluation

It was argued, essentially, that the devaluation of the currency would shift the terms of trade in favour of the production of non-tradable goods and exports, thus both stimulating output and restoring the external balance of payments. However, it also produced inflation as an immediate consequence, especially higher prices for imported food, which meant a sudden and drastic reduction of real income for the salaried classes of the population. Since the measure was also proposed as an alternative to administrative controls of foreign trade, it necessarily affected the interests of those who were profiting from import licenses and other types of regulation.

11 At the Second Extraordinary Session of the Organization of African Unity (OAU), held at Lagos (Nigeria), 28 and 29 April 1980; published by OAU, 1981.

3. Privatization

SAPs called for large-scale privatization and/or a shrinking of the public sector, where firms were generally not efficiently managed and were incurring considerable losses. However, the implementation of those measures had painful social effects: a significant proportion of the work force was displaced or made redundant and some services previously provided by the public sector were not replaced at comparable prices. Moreover, privatization meant that the State was no longer to intervene in the economy at the micro-economic level of the firm. A fundamental change in development strategy and political philosophy in regard to the economy was implied and such a change could not be accepted easily.

4. Reduction of government expenditure

The reduction of government expenditure was a key element of SAPs and led to significant cuts in expenditure by Governments for education, health, and other social purposes. Whereas expenditure on education had been growing exceptionally fast in the region during the 1960s and the 1970s, there was a reverse movement in the 1980s and the education system experienced a disastrous decline. At the same time, health services were severely hit by shortages of basic medicines and facilities.

C. Alternative Formulas for Adjustment

Furthermore, the SAPs were not having the rapid success expected and even where they achieved the most positive results it was clear that they needed much more time to achieve a lasting change in the economy of the region. In Ghana, for example, the SAP was sustained only by large infusions of foreign resources, which were not provided elsewhere, and it was not clear how long such a situation would last.

Confronted with the social effects of the SAPs and their rather mixed results, African Governments started to look for adjustment formulas outside the World Bank/IMF framework. A first step in that direction was Africa's Priority Programme for Economic Recovery (APPER)¹², put forward by OAU and endorsed by the General Assembly at its forty-third session. A second step was the United Nations Programme of Action for African Recovery and Development (UN-PAAERD), adopted by the General Assembly at the Special Session on the Critical Economic Situation in Africa,

held in June 1986. Both programmes agreed that adequate incentives should be provided for the farming population, in terms of producer prices, input supplies and the like, and in particular that a minimum of 20 per cent of public investment should be earmarked for agriculture. Both programmes called for fiscal retrenchment, better management of public enterprises and proper incentives for the private sector. Though not adhering to the free-market paradigm of IMF and the World Bank, APPER and UN-PAAERD nevertheless showed that African policy-makers were moving away from the planning approach of the 1960s and the 1970s. The Governments of the region gave particular prominence to the issue of foreign debt and, contrary to IMF and the World Bank — which pressed for debt service — they called for specific measures of debt reduction, if not outright cancellation. A key aspect of APPER and of UN-PAAERD was the pledge by industrial countries to support the African adjustment programmes.

At the end of the 1980s, not much progress was evident and the support promised to APPER was not forthcoming, while the adverse social consequences of SAPs were clear. It was then, during 1989-1990, that the ECA secretariat laid out the main lines of an African Alternative for Structural Adjustment Programmes (AAF-SAP), which was endorsed by Governments at the ECA Joint Conference of Ministers of Planning and Economic Development, held at Addis Ababa (Ethiopia), 10 April 1989. While retaining the "rational core" of SAPs, AAF-SAP stressed the following fundamental points:

- (a) The first priority was to restore conditions for long-term, sustained development and therefore the aim should be transformation for development and not mere short-term balance-of-payments equilibrium;
- (b) The State was an essential agent of development; and a doctrinaire, free-market approach was flawed, since the experience of advanced market economies themselves pointed to the key role which Governments had played in their progress to prosperity;
- (c) Adjustment measures were not feasible if their social consequences were not taken into account; and they required a wide political consensus to be successful. Cuts in education and health budgets in order to reduce expenditures were counter-productive, since they jeopardized the very basis of long-term development;

12 Twenty-first Ordinary Session of the Assembly of Heads of States and Government of OAU, July 1985, Addis Ababa.

- (d) Debt reduction should be a key element of any adjustment programme, since the servicing of foreign debt was absorbing an unsustainable proportion of the external revenues of African developing countries.

Those concerns were later translated by the ECA secretariat into specific policies and tools which provided a practical alternative to orthodox IMF/World Bank programmes.

During 1990, the movement for economic reform continued. It is difficult to gauge what effect ECA efforts to change perspectives have had, but it is noteworthy that both IMF and the World Bank have shifted their stance markedly. Not only do both institutions now lay emphasis on the social effects of adjustment, but they have come to recognize that adjustment cannot be confined within a short-term debt-servicing perspective: it has to be part of a development programme. The need for adjustment programmes to be genuinely accepted by the citizenry at large and not imposed from outside is also now seen as a fundamental condition for success.

D. Measures Recently Taken in Selected Countries

A short review of the experiences of some countries will serve to bring out the difficulties of the economic reforms which African countries are carrying out and to show that solutions that can put the region on a sustained development path are still in the making.

1. Algeria

Economic reform in Algeria may be considered to have started in 1983 at the latest but a radical turn was taken in 1990 with the clear objective of having a market economy in place by the beginning of 1991. A series of laws were voted by the National Assembly which brought about a complete restructuring of the public sector: enterprises were made autonomous and were obliged to make profits or face possible closure; the market was opened to foreign businesses and private enterprises were permitted to engage in agriculture. At the same time, financial markets were liberalized with the intention of making the dinar a convertible currency, while the authorities allowed the dinar to float downwards. The public sector, which has consumed considerable investment resources since independence, is extremely inefficient and, according to official sources, billions of dollars will be required to restore its finances. It was estimated, moreover, that the large salary increases granted by the Government in 1990 would need an extra \$12 billion for their implementation. The first-round effects of the reforms have been price increases, devaluation of the dinar and

a fall in living standards. Moreover, industrial workers and peasants have shown resistance to the reforms, because the previous system provided security despite the losses incurred by most production enterprises. The issue of debt remains a vexing one. Debt service for 1991 was estimated at \$8 billion. There is still considerable reluctance in Algeria to reschedule debt, on the ground that it would probably result in blocking off present sources of finance and also because it would entail a loss of autonomy in decision-making by national authorities.

2. Egypt

As is customary, the reform process in Egypt has been very cautious, because of the magnitude of the problems facing the country and of the possible social effects of measures that are not well thought out. For the public sector, the main priority was deregulation, since government regulations covered a considerable range of economic activity. The Government took steps to raise energy prices, which were out of line with real costs: petrol and electricity prices were raised in May 1990. Wages and rents have not yet been liberalized, however, and labour laws have yet to be reviewed. Very substantial changes were made in the financial markets, which by February 1991 had become almost completely liberalized. At that date, the foreign exchange markets were reduced to two: a primary market where proceeds from oil exports, Suez Canal dues and official aid transfers are pooled to finance strategic imports and to service debt; and a secondary market, made by the commercial banks, in which the exchange rate is determined by supply and demand, the differential between selling and buying rates not exceeding 1 per cent. The rate of exchange on the primary market is the closing rate of the previous day on the secondary market. The Government also moved to reduce the budget deficit, with the objective of not allowing it to exceed 10 per cent of gross domestic product (GDP). The Egyptian reforms received a considerable boost from the cancellation of more than \$12 billion of foreign debt, the rescheduling of the remainder on generous terms and the granting of various credits by IMF and the World Bank.

3. Ethiopia

The Government of Ethiopia introduced a New Economic Policy in March 1990 with the intention of creating a mixed economy, thus renouncing central planning. Controls on agriculture and on the sales of agricultural products were lifted, with the immediate and spectacular effect that the price of basic cereals fell by up to 30 per cent. The foreign trade regime was also changed: the range of permitted imports was enlarged and specific export incentives were

introduced. The Government also promised a housing law which would return some confiscated property and allow private transactions in real estate. The "villagization" programme was virtually abandoned but some of the announced measures, particularly those concerning the return of confiscated property, were implemented only very slowly, so that the reforms soon lost momentum.

4. Nigeria

The structural adjustment policy for Nigeria was confirmed by the Government's signature of a new standby agreement with IMF in January 1991. The 1989/1990 and 1990/1991 budgets were both elaborated within the framework of a SAP designed to reduce government intervention in the economy. A new feature was the introduction of a three-year rolling plan for all public investment — a move which signalled the end of the previous all-embracing approach to planning. However, despite the achievements of the adjustment policy, there is still considerable opposition in the country to a full-blown IMF-type adjustment formula.

5. Cameroon

The Government of Cameroon adopted in 1989 a five-year economic adjustment programme, the centre piece of which was the restructuring of the public sector. The programme provided for the liquidation of one third of public enterprises, the privatization of another third and the rehabilitation of the remainder. A start reform was made with the Produce Marketing Board and Cameroon Air lines, but progress has been very slow, a major cause being the very heavy job losses that restructuring would entail. However, the budget has been substantially reduced from the high level attained in the mid-1980s.

6. Senegal

In Senegal, the fourth adjustment programme entered into force in 1990. A new planning system was introduced, based on a three-year rolling plan for public investments along the lines of the Public Investment Programming (PIP) sponsored by the World Bank. The reform of the civil service was to continue, with the objective of reducing ranks by a further 4,800 employees: its numbers had already been cut from 68,500 in 1986/1987 to 66,500 in 1988/1989, in which financial year it had been costing 125.1 billion CFA francs. The objective was to stabilize the government wage bill (not including public enterprises) at CFA 125 billion by the financial year 1990/1991. Public enterprises (the "parapublic sector"), which account for 7 per cent of GDP, 17 per cent of wage earners and 20 per cent of investment, were to be privatized and rehabilitated — 30 out of 85 enterprises

by 1992. Financial relations between the state treasury and public enterprises were to change: financial support by the Government would be reduced; direct operating subsidies would be reduced by 32 per cent and some trading enterprises would no longer be eligible for such support; the debts owed by public enterprises to the State would be consolidated and converted into long-term loans; the accounts of public enterprises would no longer be controlled by the state commission hitherto entrusted with that responsibility; and government controls would be relaxed on enterprises jointly owned with private partners. The programme also included measures in favour of small businesses: they were to be granted more autonomy in the management of their personnel and the minimum wage was frozen. A project which had not been successful, the Dakar free enterprise zone, was resuscitated.

7. Côte d'Ivoire

A crisis hit Côte d'Ivoire in the second half of 1989, which forced the Government to abandon its March 1990 plan which included among other measures, a tax on salaries of 44 billion CFA. A stabilization and recovery programme for the period 1990-1993 was then adopted, the first phase of which aimed at reducing the budget deficit in 1991 — it had risen in 1989 to CFA 215 billion. Internal arrears on government payments of CFA 425 billion have to be cleared progressively and the financial environment of business firms radically improved. As for external debt, after the conclusion of three rescheduling agreements with creditors, the objective is to resolve the debt repayment issue within three or four years. The public sector, having absorbed the investment of more than CFA 1,300 billion, continued to record considerable losses: over the period 1982-1988 100 state enterprises made losses aggregating some CFA 85 billion, while enterprises in which the State was a minority shareholder made profits of CFA 144 billion. In addition, the payment arrears are enormous — an estimated CFA 600 billion. They include: internal arrears (debts to domestic suppliers, to internal creditors and to national companies; and sums owed to the Central Bank of West African States (BCEAO), the central bank of the African Financial Community.

8. Angola

In Angola, the process of reform began as far back as December 1985 and the programme for economic and financial reform ("saneamento") was launched in 1987, but it was only in mid-1990 that the first substantial actions were taken. In September 1990 draconian measures were introduced, including the issue of a new currency and cuts in budget expenditure. Preparations began in earnest for the reform of the

public sector and some price liberalization measures were put into effect. At the end of 1990 many official prices were raised, which resulted in an overall rise in prices of 61 per cent by February 1991. When the currency change proved unsuccessful, the devaluation of the kwanza by 50 per cent from its previous fixed rate of 29.9 to the dollar finally took place in March 1991. It proved insufficient to correct the over-valuation of the kwanza, however, which had been traded as low as Kz 1,800-2,000 to the dollar on the parallel market at the end of 1990, though the rate fell to Kz 800 to the dollar by March 1991.

9. Zimbabwe

In its Economic Policy Statement, presented with the budget for 1990, the Government of Zimbabwe set out the main lines of a profound shift in its development strategy. The central themes were macro-economic adjustment and trade liberalization, in which context the Government proclaimed its intention:

- (a) To reduce the budget deficit to a manageable level (5 per cent of GDP) in 1994/1995;
- (b) To eliminate subsidies to parastatal bodies;
- (c) To introduce cost recovery in the financing of education;
- (d) To tighten the administration of free health care so that it would be reserved to those truly in need;
- (e) To reduce the size of the bureaucracy; and
- (f) To improve debt management.

Trade liberalization would be introduced in a gradual way: the present system of import controls would be replaced by a tariff based on, and incentives given for, the promotion of exports. Regulation of economic activities would be reduced, particularly price controls and regulations with regard to wages, salaries and employment. Given the need for more investment, policy changes were to be made in order to mobilize

and encourage both local and foreign investors. Among other objectives, the Economic Policy Statement included positive real interest rates and the establishment of a stock exchange. The 1990/1991 budget included concrete measures to implement the new policy. At a meeting with members of the Paris Club of official creditors the Government outlined its development objectives and called for external resources estimated at 12 billion French francs.

E. The Way Forward

This short review of action taken by African Governments shows what challenges they face as they tread the path of reform. As indicated by the evaluation of UN-PAAERD recently carried out by the United Nations¹³, the results of a decade of adjustment and reform are still disappointing, despite some successes in some areas. In fact, the resistance to reform is such that Governments have in many cases been forced recently to abandon certain policies. In the Congo, for example, the movement for political democratization also brought into the open considerable pressure for the Government to raise civil servants' salaries and reinstate the guarantee to hire university graduates. The widespread nature of that movement has in many instances led the citizenry to express their grievances over the effects of SAP measures and to demand that they be rescinded. At the same time, the rapid changes taking place in Eastern Europe and the USSR have further weakened the case for the planning approach to development which was traditional in Africa. Nevertheless, although the need to liberalize their economies is now more or less accepted by Governments of the region, the AAF-SAP prescription for conceiving and implementing adjustment in the framework of a long-term perspective of development remains, probably, the best alternative.

13 Final Review and Appraisal of the Implementation of the United Nations Programme of Action for African Economic Recovery and Development 1986-1990. (A/AC.238/L.2).

IV. FOREIGN DEBT AND RESOURCE FLOWS

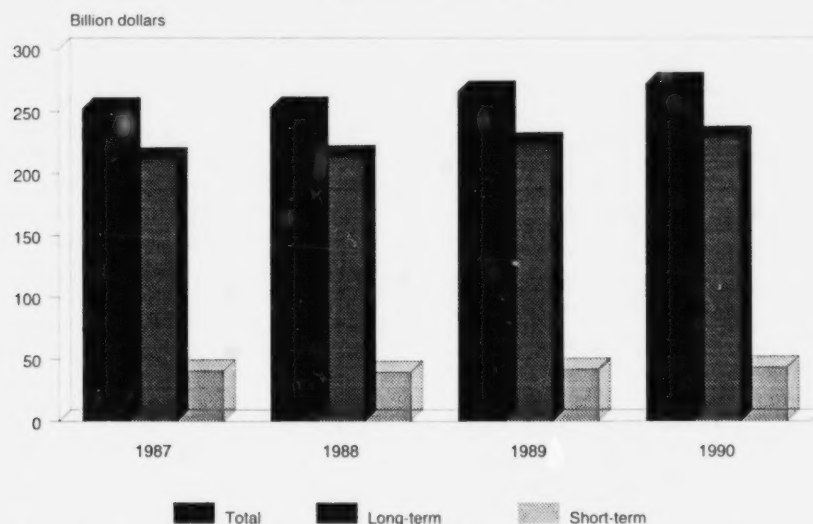
A. The debt at the end of 1980s

According to OECD¹⁴, developing Africa's debt reached \$257 billion by the end of 1989. That figure confirms the bleak outlook described in previous ECA studies (see for example, the Survey of Economic and Social Conditions in Africa, 1988-1989 edition). Tentative estimates for 1990 show that the debt stock may have fallen: that is due only to the considerable debt relief obtained by Egypt in the wake of the Gulf war, the debt burden of other African countries having in fact worsened.

in North Africa and that in sub-Saharan Africa.

In the period 1980-1989, developing Africa's debt more than doubled, growing significantly faster than the debt of developing countries as a group (9.5 per cent compared to 7.8 per cent). The corresponding figures for 1982-1989 were 9.1 per cent a year in developing Africa compared to 7.2 per cent for developing countries as a whole, and for non-African countries it was only 5.1 per cent. As a consequence, the share of the African region in the total for developing countries grew from 16.4 per cent in 1982 to 19.4 per cent in 1989.

Fig. 3: Developing Africa
total external debt, 1987-1990



The debt growth rate for the region fell drastically in 1988-1989 to average only 0.6 per cent a year, after a rapid expansion in 1985-1987 of nearly 17 per cent a year. Nevertheless, the debt stock has reached a level which is clearly unsustainable: all debt indicators — debt per head and the ratio of debt to gross national product (GNP) or to exports of goods and services now show developing Africa as the region with the heaviest debt burden and at the same time the poorest and least able to repay.

Debt service has not shown the same growth pattern, however, as total debt: in 1989 it amounted to \$27.1 billion compared to \$21.3 billion in 1982, an average growth of 3.5 per cent a year. In 1989, despite the write-offs enjoyed by lower-income countries, it grew by 7.1 per cent, following on a considerable 18.2 per cent in 1988. The lower momentum in the growth of debt service over the whole period 1982-1989 was attributable to the accumulation of arrears and to rescheduling and debt-reduction measures.

Table IV.1 below shows some debt indicators for 1982 and 1988-1990, distinguishing between the situation

14 OECD, *Financial and External Debt of Developing Countries, 1989 Survey* (Paris, 1990).

Table IV.1
Debt indicators for developing Africa, 1982 and 1988-1990

	1982	1988	1989	1990
	Billion of dollars			
Total debt	143.0	256.0	256.0	249.4
of which:				
North Africa	67.0	114.0	113.0	91.9
Sub-Saharan Africa	73.0	141.0	144.0	157.5
Debt service	21.3	25.3	27.1	27.8
of which:				
North Africa	12.0	13.0	14.5	15.7
Sub-Saharan Africa	9.3	12.3	12.6	12.1
	Percentage ratio			
Debt/GDP	44.1	23.6	79.0	75.3
of which:				
North Africa	49.3	58.6	63.8	53.5
Sub-Saharan Africa	38.9	87.8	87.6	88.9
Debt/Exports of goods and services	171.8	306.2	316.1	273.6
of which:				
North Africa	157.4	249.9	280.0	211.0
Sub-Saharan Africa	184.6	369.4	346.2	325.9
Debt service/Exports of goods and services	26.3	30.4	33.3	30.5
of which:				
North Africa	28.2	28.9	35.9	36.0
Sub-Saharan Africa	23.5	32.2	30.9	25.0
Sources: OECD, Financial and External Debt of developing countries, 1989 Survey				
Note: The Sudan is included in sub-Saharan Africa.				

B. The distribution by country of the regional debt

One characteristic of the debt situation was the high concentration of debt in relatively few countries. In 1989, the five countries of North Africa (excluding the Sudan) held between them \$113 billion or 44 per cent of the regional total, compared to \$144 billion in sub-Saharan Africa. Per head of population, debt in North Africa amounted to \$990 in 1989, more than three times the figure for sub-Saharan Africa (\$300). In 1990, even taking account of the reduction of Egypt's debt, it was still \$702 — almost twice that of sub-Saharan Africa (\$317). In relation to gross domestic product (GDP), the same discrepancy existed: debt/GDP reached 53.5 per cent in North Africa, compared to 82.1 per cent in sub-Saharan Africa.

1. North Africa Excluding the Sudan

In 1989, the North African total (as shown in the table) was \$113 billion dollars. That figure includes the estimated debt of the Libyan Arab Jamahiriya and is still subject to a substantial margin of error because some debts to non-OECD countries were not recorded. Compared to 1988, the total fell slightly, mainly because of the various rescheduling exercises in the subregion. Algeria, one of the most severely indebted countries in developing Africa, has maintained its policy of not resorting to rescheduling, but its debt-service burden has grown so heavy that it may change its stance. Recent information set Algerian debt service in 1991 at a huge \$7 billion, 58 per cent of expected export revenues. The Government seems to prefer bilateral refinancing to rescheduling; it has sought relief on the financial markets.

Egypt rescheduled its external debt for the first time in May 1987: the exercise covered \$7.6 billion of its obligations. Between May 1987 and March 1990, multilateral institutions rescheduled some \$900 million of its debt. However, given the very rapid growth of Egyptian debt, the weight of its military debt (around \$7 billion) and its poor economic performance, no break-through appeared probable until the end of the Gulf War. First of all, the United States of America agreed to cancel the whole of the military debt which it was owed and the Gulf States cancelled a further \$7 billion. It is not yet clear by how much the debt has been reduced: while the Government put forward an estimate of its indebtedness at the end of 1990 of only \$28 billion, other sources have quoted \$35 billion — which would mean that some \$15 billion had been cancelled.

Morocco saw its debt double in 1980-1989 and debt service had risen to \$2.1 billion by 1989, with a ratio of 33.2 per cent to exports of goods and services. The debt-rescheduling exercise of 1989 brought some reduction and eased the pressure on the balance of payments on current account, but a solution of Morocco's debt problem is still to come.

2. Sub-Saharan Africa

The total debt of sub-Saharan Africa reached \$144 billion in 1989, — a rise of 2.1 per cent in that year. It had more than doubled in 1982-1987, then fell from \$142 billion to \$141 billion in 1988. The moderate rate of growth was due to rescheduling and debt reduction in the poorest countries of the area. However, the total rose again in 1990 to an estimated

\$157.5 billion at the year-end, an increase of 9.3 per cent. According to the World Bank, which has data slightly different from OECD, sub-Saharan debt reached \$160.8 billion at the end of 1990 compared to \$147 billion in 1989, a rise of 9.4 per cent. The estimates published by the International Monetary Fund (IMF) in the latest issue of its *World Economic Survey*¹⁵ confirm the trend: IMF reports an increase of the debt in 1989 for sub-Saharan Africa, excluding Nigeria, to \$118.9 billion, 15.7 per cent more than in the previous year.

Debt service by sub-Saharan countries grew more slowly than their total debt: it more or less stagnated after reaching \$12.4 billion in 1985. After falling to \$10.6 billion in 1987, it recovered to \$12.6 billion in 1989. Those fluctuations are rather difficult to interpret since they were due to several factors: *inter alia*, the effect of rescheduling and debt reduction, changes in exchange rates — particularly the dollar rate — and accumulation of arrears. However, the fact remains that the burden of debt service on sub-Saharan countries is out of proportion to their capacity to repay and has become an impediment to their development.

Debt is highly concentrated in this grouping: in 1988, two countries, Nigeria and Côte d'Ivoire, accounted for a third of the total and, if the Congo, Zaire, Kenya and Zambia are added, the six held more than half (57.4 per cent). That did not mean, however, that the remaining countries were in a favourable position: half the countries of sub-Saharan Africa (22) are classified as severely indebted. In extreme cases, as in the Sudan, debt is no longer serviced and it is difficult to envisage in what circumstances it will be, short of outright forgiveness or radical reduction. Given the very low per capita income of the area — the lowest of all world regions (\$390.0 in 1990 in current dollars) — a ratio of debt service to exports of goods and services of 25 per cent in that year for sub-Saharan Africa excluding Nigeria, as reported by IMF is considerable, even compared to 29.3 per cent in the region of Latin America and the Caribbean.

C. The structure of debt

Table IV.2 below contains information on the structure of debt in developing Africa in 1982 and 1987-1989. As may be seen, the debt is mostly long-term and owed to official creditors. The situation has not changed much over the years: in 1982, long-term debt represented 80 per cent of the total and by 1989 it had risen to 82 per cent. Official creditors accounted

for 70.7 per cent in 1982 and 73.5 per cent in 1989. The share of private creditors, including debt owed to financial markets, was small and declined from 29.3 per cent in 1982 to 26.5 per cent in 1989. Within the official debt category, that owed to multilateral institutions grew rather impressively from \$22 billion in 1982 to \$52 billion in 1989 — 15.7 per cent in 1982 but 20.2 per cent in 1989 of the total debt. Debt related to overseas development assistance (ODA), on the other hand, grew more or less in line with total debt, its share ranging between 10 and 11 per cent

Table IV.2
The structure of external debt in developing Africa, 1982 and 1988-1990 (Billions of dollars)

	1982	1988	1989	1990
Regional total	140	254	255	257
of which:				
Long-term	112	209	211	211
Short-term	26	42	41	43
Official	99	194	187	189
Private	41	60	68	68
North Africa	67	112	114	113
of which:				
Long-term	50	90	90	88
Short-term	15	20	20	22
Official	46	83	82	82
Private	21	29	32	31
Sub-Saharan Africa	73	142	141	144
of which:				
Long-term	62	119	121	123
Short-term	11	22	21	21
Official	53	111	105	107
Private	20	31	36	37

Source: OECD, Financial and External Debt of developing countries, 1989 Survey (Paris 1990)

The withdrawal of private creditors and particularly of the banks, which have steadily reduced their exposure in the region, forced Governments to rely more on official sources of finance and, to a growing extent, on multilateral institutions. There are some differences in debt structure between Sub-Saharan Africa and North Africa, but they are not substantial. However, both long-term debt and official debt were more preponderant in sub-Saharan Africa than in North Africa in 1989: long-term debt represented 85 per cent and official debt represented 74.3 per cent of the total, compared to 77.9 per cent and 72.6 per cent,

15 IMF, *World Economic Survey* (October 1989, Washington, DC).

respectively, in North Africa.

At the country level, however, the differences were more substantial: in 1989, Algeria had more than 50 per cent, Nigeria had 33.5 per cent and the Congo had 22.8 per cent of total debt obligated to financial markets. Generally speaking, the debt owed to private sources was a higher proportion of the total debt in middle-income countries than in lower-income ones. In the majority of sub-Saharan, low-income countries — according to the IMF/World Bank classification — reliance on financial markets was minimal (13.5 per cent of the total in 1988) and debt to the rest of the private sector was practically non-existent.

In low-income sub-Saharan countries, private debt fell from 25 per cent of total debt in 1982 to less than 20 per cent in 1989. Multilateral institutions, ODA resources and export credits were the principal sources of finance for that group of countries in 1989: multilateral debt represented 30.8 per cent compared to 22.0 per cent in 1982, while the share of ODA rose from 8.5 per cent to 10.8 per cent. IMF credits have remained at \$6 billion since 1985, falling as a percentage of total debt, however, from 6.8 in 1982 to 5.4 in 1988. Despite the launching by the World Bank of the Special Programme of Assistance to those countries in 1987, resources provided by the World Bank and IMF remained below the needs.

D. The Causes of the Growth of External Debt

The main factor accounting for the rapid growth of debt in developing Africa during the 1980s, before and after 1982 — when the debt crisis broke out — was the persistent deficit in external financial flows resulting from economic crisis. The causes of crisis have been manifold: external shocks, *inter alia*, fluctuations in the price of oil; export revenues depressed by low commodity prices, falling in value from around \$90 billion in 1980 to only \$50.6 billion in 1989; the rise in interest rates in the early 1980s, which made it difficult for most countries to tap private sources of finance, particularly financial markets. Those factors left developing countries with no alternative but to increase external debt in order to finance their current-account deficits. (Oil exporters were spared the effects of price fluctuations until oil prices collapsed in 1986, when they too were subjected to a drastic fall in their export revenues.)

Hence, practically all African developing countries were affected, whether high-income or low-income, petroleum-exporting or not. With external creditors imposing harsher conditions after 1982 and the collapse of oil prices in 1986, debt rescheduling and recourse to official sources of lending became widespread. IMF and the World Bank made the provision of new finance under their adjustment programmes conditional on the conclusion of debt rescheduling agreements. In their turn, those agreements became a factor in debt growth, because they only postponed debt repayments and provided for the capitalization of deferred interest. Most countries, suffering from a severe economic crisis, were unable to honour their debt-service obligations, so that arrears piled up and increased the debt further. The part played by arrears in the growth of debt has been substantial.

The World Bank reported that whereas sub-Saharan countries were due to pay \$18.2 billion in debt service in 1989, the actual payment was only \$7.2 billion, or less than half¹⁶. In 1980, arrears had been a negligible element in the debt of those countries — only \$221 million out of a total of \$56.2 billion, according to the World Bank¹⁷. By 1990, however, arrears were estimated at \$6.7 billion after reaching a peak of \$7.2 billion in 1989. The arrears issue was particularly acute in the Sudan and Sierra Leone, which practically ceased to service the debt owed to multilateral institutions, particularly IMF. The Sudanese debt in 1989 was estimated by the World Bank at just under \$13 billion, on which paid service was only \$97 million, while liabilities to IMF alone were \$884 million. The accumulated arrears of interest had by then reached a considerable \$2,874 million, compared to a mere \$49 million in 1980. In Sierra Leone, debt had reached \$1,057 million in 1989, on which only \$4 million was paid in terms of service, while liabilities to IMF alone were \$105 million and arrears of interest stood at \$108 million.

E. Debt Relief

Though African developing countries faced diverse situations, they all shared a basic inability to honour their debt-service obligations. As already stated, even Algeria, which for long resisted any idea of rescheduling and had made every effort to meet those obligations, called eventually for a direct injection of funds by its trade partners, even proposing to pay back debt with a share of its oil deposits. It is true that a large

16 World Bank, *World Debt Tables, 1990-1991* (Washington DC, 1991).

17 *Ibid*

part of the resources obtained through borrowing was not productively used in most countries, being applied to finance consumption or invested in non-profitable projects. That cannot invalidate the need for debt relief. The approach adopted by IMF and the World Bank during most of the 1980s (see paragraph 18 above) has not worked. Lenders have finally recognized the need for debt reduction, even if they have retained a case-by-case approach and still insist on linking debt relief to structural adjustment.

Three plans for relieving the external debts of the region were launched in 1988-1989: the Toronto Plan of October 1988, the Brady Plan of March 1989 and the Dakar Plan of May 1989. The impact of the last-named on the indebtedness of certain countries was significant. The other two plans, because of the conditions stipulated, did not fully meet the need of African debtors for a large reduction in their debt burden.

1. The Toronto Plan

The Toronto Plan¹⁸ aimed at providing debt relief for low-income African countries. Any such country could apply provided that it engaged into an adjustment or economic reform plan under World Bank/IMF sponsorship. Of the 32 potential beneficiaries in the region — all except one from sub-Saharan Africa — 26 satisfied that proviso and 13 opted for the so-called "Toronto terms" when they came into force. The reason why not all eligible countries felt able to benefit from the Plan was to be found in the conditionalities set up from the outset with regard to adjustment and economic reform programmes. Under the Plan, the maturity of all rescheduled official concessional debt could be extended to 25 years, which could include a grace period of 14 years, and interest rates would be at least as low as on the initial loans. For non-concessional debt, the proposed menu of options was as follows:

Option A: one third of the debt to be cancelled; the remainder to mature after 14 years; interest to be charged at market rates but with a grace period of 8 years;

Option B: the debt to mature after 25 years; interest to be charged at market rates but with a grace period of 14 years;

Option C: interest to be charged at less than market rates, with a grace period of 8 years; the maturity to be reduced, however, to 14 years.

Between April 1988 and June 1990, those 13 countries negotiated the rescheduling of \$3.1 billion of debt owed to members of the Paris Club of official creditors.

2. The Brady Plan

In the Brady Plan, named after its Secretary of the Treasury, the Government of the United States conceded for the first time the need for a comprehensive approach to the indebtedness of developing countries. The Plan, which applied to the small number of middle-income countries that are in Africa and were considered eligible¹⁹, reflected in its main outlines the proposals which France and Japan had made in September 1988. While undertaking to reduce the debt burden, the Brady initiative sought to create conditions which would renew financial and investment flows to the target countries. It contained a series of provisions that would enable banks (whose share in the middle-income countries debt was large) to restructure their loans, because it also would involve both IMF and the World Bank in loan guarantee operations.

3. The Dakar Plan

The Dakar Plan was launched at the "Sommet Franco-Africain", the Summit Conference of the Heads of State of Francophone Countries, held at the Senegalese capital on 25 May 1989. It provided for the write-off of public debts owed to France by 36 countries²⁰. Under the Plan, the French Government cancelled debt amounting to FFfr 6 billion (\$2.5 billion), which represented 43 per cent of the indebtedness to France (FFfr 36 billion) of those countries. According to the French Minister of Finance, Mr. Bérégovoy, the measure would cost the French Treasury FFfr 1.5

18 Marchés Tropicaux, 2 February 1990, p. 307. (The initiative for the Toronto Plan was launched by President Mitterand of France at the "Economic Summit" meeting of the G7 group of countries held at Toronto (Canada) in October 1988.)

19 The Congo, Cote d'Ivoire, Gabon, the Gambia, Guinea, Madagascar, Morocco, Mozambique, the Niger, Nigeria, Senegal, Sierra Leone, the Sudan, Togo, Zaire and Zimbabwe. In addition, certain low-income countries were considered potential beneficiaries.

20 Benin, Botswana, Burkina Faso, Burundi, Cape Verde, Central African Republic, Chad, Comoros, Djibouti, Equatorial Guinea, Ethiopia, the Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, the Niger, Rwanda, Sao Tomé and Principe, Senegal, Sierra Leone, Somalia, the Sudan, Togo, Uganda, the United Republic of Tanzania, Zaire and Zambia.

billion a year. At a later Summit, held at La Baule (France) on 20 and 21 June 1990, four countries not included in the Dakar Plan and owing FFfr 12 billion to the Caisse Centrale de Cooperation Economique — Cameroon, the Congo, Côte d'Ivoire and Gabon — were granted a cut in the interest rate charged from 10 per cent to only 2 per cent. The main beneficiary of those measures was Senegal with a debt write-off amounting to FFfr 2 billion. The Plan complemented that of Toronto to the extent that it began to address the debtors' request for the unconditional cancellation of the external debt of the region. It was also innovative in that it included some middle-income countries, such as Senegal, that were severely indebted. The effects of those measures, obviously, varied according to the extent of the national indebtedness to France.

4. Other Debt-reduction Schemes

Some widely discussed schemes for reducing debt and debt servicing have been diversely received in developing Africa and are briefly described in the paragraphs which follow.

The conversion of debt into local investment through debt-equity swaps has received a very cautious welcome. Morocco was one of the first countries to adopt such a scheme, when signing in September 1990 a rescheduling agreement with the London Club of Creditors, in the framework of the Brady Plan, which provided for the restructuring of the current outstanding long-term debt and brought within its scope previously renegotiated bank debt. Mozambique and the Sudan, which were more inclined to welcome the scheme, did not attract foreign investment. Madagascar was the first country in which debt was converted into development financing: some of its medium-term debt was bought on the secondary market and converted at a discount of 50 per cent to be recycled into development and environmental protection projects.

Debt buy-back arrangements have been suggested. The handicap for African debtor countries is that they have no resources for buying back depreciated debts on the secondary market.

The indexing of payments to export earnings appeared to a large number of debtor countries a realistic proposal, since it established a direct relationship between the debt burden and the amount of export earnings, which were an indicator of their capacity to

repay.

The "new money" scheme consisted in converting debts into local currency, as was done in Nigeria but could not be easily applied to many debtor countries, particularly those in the French Financial Community (CFA), whose currency is pegged to the French franc at a fixed parity. It also poses problems because of its potential inflationary effects.

Under purchasing agreements, loans are written off subject to certain conditions; but such schemes run into difficulties because debtor Governments find the secondary debt markets unrealistic. The interaction of supply and demand is felt to be not dynamic enough on those markets.

The number of African countries which benefited from relief measures proved to be limited because of the conditions they were required to fulfill. Middle-income countries benefited less, because the plight of low-income countries in Africa south of the Sahara was the main worry of the community of official lenders. The amount of the official debt of the latter countries which was restructured in 1986-1989 was as much as \$23 billion, spread over 47 rescheduling exercises. In spite of that, the number of approaches made to creditors with a view to securing the rescheduling of debt continued to increase — since the obligations of those countries had continued to mount because of capitalization of arrears. That was a sure sign that the debt malaise persisted and that relief measures were not effective enough. If one looks at the responses made by creditors to the concerns expressed by African debtors, it can be noted that a consensus is far from being achieved as to what factors influence the growth of external debt and, consequently, what are the appropriate measures of debt relief.

Creditor countries have not as yet been willing to take into account the common position adopted by Governments of African debtor countries on the external debt of the region²¹, despite the undoubtedly realistic proposals contained therein. The stance taken was comprehensive, defining a new framework of relationships between debtors and creditors. The creditors were far from enthusiastic, even though it had the advantages of being conciliatory in form; of incorporating all aspects of the debt crisis, while taking account of the interests of creditors and debtors alike; and of reaffirming the determination of the group of debtors to honour their commitments. Creditors continue to insist on a case-by-case appraisal within

21 Adopted at the Third Conference of the Assembly of Heads of State and Governments of the Organization of African Unity, meeting in Extraordinary Session at Addis Ababa (Ethiopia) in November-December 1987.

the framework of IMF and World Bank adjustment programmes, whatever changes that framework has undergone. While virtually all countries in the region complied with the requirements of creditors by realigning their economic policies to the adjustment criteria of IMF, the response of the creditors failed to meet expectations.

F. Prospects

In 1990, the external debt of the region declined to around \$250 billion. As explained at the beginning of this chapter, the large debt reduction obtained by Egypt was mainly responsible: the debt of the other countries continued to rise and in sub-Saharan Africa the increase of 9.3 per cent followed one of 7.1 per cent in 1989. The sum of \$250 billion is roughly equivalent to the GDP of the entire region or three times its exports of goods and services. In spite of export gains in 1990, the debt-service burden seems to have remained about 30 per cent of exports, as in 1989. The debt burden has therefore continued to grow, in spite of the relief measures announced by public lenders. Those measures complemented the Special Assistance Programme of the World Bank, the two new programmes (the Structural Adjustment Financing Facility and the Enhanced Structural Adjustment Facility) launched by IMF and the various Plans initiated in 1989.

The low-income Sub-Saharan African countries were the major beneficiaries of the relief measures proposed by the lenders, who restructured debt worth \$3,374 million in January-September 1990 for nine countries²². Among the middle-income countries, Egypt, which had negotiated unsuccessfully for several months to reschedule about \$10 billion of its public debt, secured the cancellation of \$14 billion of debt owed to USA and the Gulf States, as well as \$11 million owed to Canada²³. Furthermore, the Paris Club agreed in May 1991 to halve Egypt's official debt to its members, a move which should have brought the total official debt of that country down to only \$21.1 billion in July 1991. The foregoing measures covered a little more than a quarter of Egypt's total debt and needed to be backed by other equally substantial measures on the part of other public creditors. They would help to reduce the debt service of the country over the next

few years. While admitting the exceptional nature of the Egyptian case, it can be said that the speed with which those debt relief measures were taken clearly shows the ability of creditor Governments to bear eventually the gradual phasing out of most of the debt owed them by African developing countries.

Restructuring agreements are only a temporary solution, however they do not substitute for radical debt reduction. In that spirit, new initiatives were taken in September 1990 for dealing with the public debt of developing countries. The first initiative, which came from Mr. Jan Pronk, the Dutch Minister for Development Cooperation, at the United Nations Conference on the Least Developed Countries, held at Paris in September 1990. He called for the total cancellation of the public debt owed by Governments of those severely indebted countries which had embarked on structural adjustment programmes. The second initiative, proposed by Mr. John Major, the then British Chancellor of the Exchequer at the September 1990, Commonwealth Conference in Trinidad, advocated a review of some of the terms of the Toronto Plan which would have the effect of reducing the debt of the developing countries by \$18 billion. Mr. Major proposed to write-off two thirds of the debt of the poorest nations, instead of only one third as provided by the "Toronto terms". Those proposals represented an important step forward, but unfortunately they still adhered to the low- and middle-income concepts and still made structural adjustment a condition of debt relief.

The increase in the price of petroleum following the outbreak of the Gulf Crisis further aggravated the strain on the external position of the majority of countries in the region, compelling them to search for new short-term soft loans in order to cover budgetary expenditures and settle petroleum bills. That demonstrated once more the vulnerable debt position of Governments in the face of unavoidable external shocks. The Compensatory Financing Facility and the Contingency Financing Facility of IMF, which are meant to assist countries engaged in reform programmes when they are exposed to such shocks, by providing them with compensatory funds, did not significantly compensate any African country in 1990 for the losses caused by the Gulf Crisis or those resulting from the low prices of primary commodities.

22 In millions of dollars: Central African Republic, 4; the Congo, 1052; Madagascar, 139; Mozambique, 707; the Niger, 116; Senegal, 117; Togo, 84; the United Republic of Tanzania, 200; and Zambia, 965. Except for the Congo, those relief measures were arranged in the framework of the Toronto Plan.

23 See *African Research Bulletin*, vol. No. 11 (Oxford, 16 November - 15 December 1990), p. 10189.

Most of the scenarios for the debt prospects of developing countries are based on simultaneous reductions in outstanding debt and interest rates. According to the scenario of the LINK project²⁴, if such reductions had been applied during 1989-1991 to 15 severely indebted countries, they would have led by 1991 to a reduction of 41 per cent in the burden of debt service of those countries and also stimulated world growth during those years. It is hoped that creditors will bear in mind that current trends in the debt of the developing countries are a threat to world economic balance — a reality which was already only too familiar to the countries of the African region during the 1980s.

G. Balance of Payments and Resource Flows

The estimated current-account deficit of African developing countries declined considerably from \$12.2 billion in 1989 to only \$5.3 billion in 1990. The deficit in 1990 represented 5.8 per cent of exports of goods and services, compared to 15 per cent in 1989 and an average of 19.8 per cent for the period 1981-1989. Table IV.3 below gives the financial elements that produced those results, together with the corresponding data for 1988.

Table IV. 3
Aggregate balance of payments of African developing countries, 1988-1990
(Billions of dollars)

	1988	1989	1990
Exports (f.o.b.)	51.1	58.9	73.7
Imports (f.o.b.)	62.2	68.2	74.4
Trade balance	-11.2	-9.3	-0.7
Services net	-18.0	-18.6	-21.9
Goods and services balance	-29.1	-28.1	-22.7
Transfers	14.4	15.9	17.4
Current account balance	-14.7	-12.2	-5.3
Net capital flows a/	16.7	10.2	-1.8
Reserves	1.9	-2.0	-7.1

Sources: IMF, World economic Outlook, May 1991 and national sources
(a/) Including errors and omissions.

The deficit on merchandise trade in f.o.b. terms fell to less than \$1 billion in 1990, due in large part to the strong export performance of the oil-exporting countries. The estimated services deficit, however, deteriorated further in that year to \$21.9 billion from \$18.8 billion in 1989, due to a decline in receipts by 1.4 per cent and an increase in payments of 5.7 per cent as a direct consequence of the Gulf crisis. The decline in receipts was due to the loss of tourism revenues and, in the case of Egypt, of Suez Canal dues. The increased payments resulted from higher transport and insurance costs. The net balance of transfers, however, improved from \$15.9 billion in 1989 to \$17.4 billion in 1990, in line with the growth of net resource flows to African developing countries. Some countries, mainly in North Africa, suffered significant losses from the reduction in remittances and other transfers by expatriate workers in the Gulf States.

In 1989, official unrequited transfers amounted to \$6.9 billion and helped to finance 47 per cent of the aggregate current-account deficit. The estimate for 1990 of \$7.3 billion financed 60 per cent of that deficit. During 1985-1989, official transfers accounted on average for 63 per cent, direct investment for 29.5 per cent and other long-term capital for 4 per cent of the aggregate current-account deficit. Over the same period, net portfolio investment and other short-term capital flows (including errors and omissions) produced regional deficits equivalent to 6.6 per cent and 13.9 per cent of current-account deficits, respectively.

Table IV.4 below analyses financial resource flows to the region in 1987-1989. Official development finance (ODF) amounted to \$24.6 billion in 1989, a decrease of 2.4 per cent compared to \$25.2 billion in 1988. Official development assistance (ODA) by bilateral donors and multilateral institutions, the largest component of ODF, fell sharply in 1989 (by 5.5 per cent), while other components increased by about 10 per cent. Export credits net of repayments were even negative, especially in 1988 (\$2 billion), while private flows to the region remained stagnant during 1987-1989. In real terms, at 1988 prices and exchange rates, total resource flows to the region in 1989 were \$28.2 billion, 2.9 per cent higher than in 1988 and much the same as in 1987.

24 See Department of International Economic and Social Affairs of the United Nations, *World Economic Review* 1989, p.78.

Table IV.4
Resource flows to African developing countries, 1987 - 1989
(Billions of dollars)

	1987	1988	1989
Official development finance (ODF)	22.0	25.2	24.6
of which:			
Official development assistance (ODA)	18.3	19.9	18.8
of which:			
Bilateral	13.5	14.6	..
Multilateral	4.8	5.3	..
Other ODF	3.7	5.3	5.8
Export credits (net)	0.0	-2.0	-0.8
Private flows	4.1	4.2	4.1
Total flows	26.1	27.4	27.9
Memorandum item:			
total flows at 1988 prices and exchange rates	28.0	27.4	28.2
Source: OECD, Financing and External Debt of Developing Countries, 1989 Survey (Paris, 1990)			

H. Exchange Rates

It is a commonplace that most kinds of prices exhibit considerable fluctuations over the years. (Nominal) exchange rates — the prices of a given currency in terms of other currencies — are often much more "sticky", for reasons associated with the institutional organization of financial affairs. The term "nominal" is used — as in this section — when it is desired to distinguish the quoted, operational rates at which trade and financial transfers take place from "effective" exchange rates, which endeavour to reflect the reality of domestic purchasing power and international competitiveness of the economy. The effective rates tend to behave more like other prices.

During 1988-1990, many Governments in developing Africa have devalued the national currency and in some

cases they have also altered the exchange-rate regime. This section opens with an assessment of the outcome at the regional level. A review follows of the economic and political background of the changes in nominal rates in a number of the countries in question. Finally, an attempt is made to establish the corresponding changes in effective rates at regional and country level.

1. Nominal Exchange Rates

For developing Africa as a whole, the weighted average nominal exchange rate against the dollar depreciated in 1989 by 19.8 per cent; and in 1990 it appreciated by 6.2 per cent.

Table IV.5 below shows indicators of both nominal and effective exchange rates for the region in 1988-1990 and their inter-relationship via the trends in consumer prices.

Table IV.6 below shows average exchange rates, both nominal and effective, together with average index numbers of consumer prices, of African developing countries in the years 1988-1990.

Table IV.5
Exchange rate indicators for developing Africa,
1988-1990 a/
(1985=100)

	1988	1989	1990
Nominal rate	154.4	184.2	173.4
Consumer prices: developing Africa	225.7	348.4	449
Consumer prices: USA	109.9	115.2	121.4
Effective rate	138.2	159.2	140.2
Effective rate as percentage of nominal rate	89.5	86.1	80.8

Source: International Financial Statistics, IMF, various issue
a/ Averages calculated by weighting country data by GDP (cons

Table IV.6
Exchange rates index numbers of consumer prices in African developing countries, 1988-1990

	1988			1989			1990		
	Nominal rate	Consumer prices	Effective rate	Nominal rate	Consumer prices	Effective rate	Nominal rate	Consumer prices	Effective rate
Algeria	5.9	127.9	5.1	7.6	139.8	6.3	9.0	163.0	6.7
Angola	29.9	..	..	29.9	..	..	29.9	..	..
Benin	297.9	107.6	304.2	319.0	112.1	327.8	272.3	115.1	287.2
Botswana	1.8	130.9	1.5	2.0	46.0	1.6	1.9	162.7	1.4
Burkina Faso	297.9	98.8	331.3	319.0	98.3	373.9	272.3	97.8	338.0
Burundi	140.4	114.0	135.4	158.7	127.3	143.6	171.3	136.3	152.5
Cameroon	297.9	124.0	264.0	319.0	14.0	296.4	272.3	124.4	265.7
Cape Verde	72.1	120.7	65.6	78.0	..	..	70.0	..	..
Central African Republic	297.9	91.3	358.5	319.0	92.0	399.5	272.3	91.9	359.7
Chad	297.9	94.4	346.8	319.0	89.8	409.2	272.3	90.3	366.0
Comoros	297.9	..	..	319.0	..	..	272.3	..	..
Congo	297.9	108.6	301.4	319.0	113.1	324.9	272.3	115.2	286.9
Cote d'Ivoire	297.9	115.3	283.0	319.0	114.8	320.1	272.3	114.5	288.7
Djibouti	117.7	..	..	177.7	..	..	177.7	..	..
Egypt	0.7	174.4	0.4	1.1	211.5	0.6	2.0	247.0	1.0
Equatorial Guinea	297.9	73.0	448.4	319.0	78.0	471.2	272.3	78.0	423.7
Ethiopia	2.1	94.2	2.4	2.1	101.6	2.3	2.1	106.8	2.4
Gabon	297.9	95.0	344.6	319.0	101.6	361.7	272.3	110.4	299.4
Gambia	6.7	216.0	3.4	7.6	233.9	3.7	7.9	262.5	3.6
Ghana	202.4	228.3	97.2	270.0	286.5	108.6	326.3	393.2	100.2
Guinea	475.0	290.3	179.8	590.0	365.7	185.9	650.0	464.9	169.7
Guinea-Bissau	1105.0	590.5	205.7	1810.1	..	..	2100.0	..	..
Kenya	17.8	118.4	16.5	20.6	130.0	18.2	22.9	145.3	19.2
Lesotho	2.3	147.0	1.7	2.6	168.6	1.8	2.6	188.2	1.7
Liberia	1.0	119.8	0.9	1.0	125.4	0.9	1.0	499.8	0.2
Libyan Arab Jamahiriya	0.3	..	..	0.3	..	..	0.3	..	..
Madagascar	1407.0	167.0	926.0	1603.4	182.1	1014.3	1494.1	203.6	890.9
Malawi	2.6	191.1	1.5	2.8	215.0	1.5	2.7	240.3	1.4
Mali	297.9	108.7	301.1	319.0	108.6	338.4	272.3	109.2	302.7
Mauritania	75.3	117.7	70.3	83.1	133.0	71.9	80.6	141.7	69.1
Mauritius	13.4	111.5	13.2	15.3	125.6	14.0	14.9	142.6	12.7
Morocco	8.2	114.3	7.9	8.5	117.9	8.3	8.2	126.0	7.9
Mozambique	525.0	548.2	105.3	739.0	778.9	109.3	860.0	1012.6	103.1
Namibia	2.3	137.5	1.8	2.6	157.9	1.9	2.6	185.8	1.7
Niger	297.9	89.0	367.8	319.0	86.5	424.9	272.3	85.8	385.2
Nigeria	4.5	160.5	3.1	7.4	241.5	3.5	8.0	259.6	3.8
Rwanda	76.5	106.0	79.3	80.0	107.1	86.0	82.6	11.6	89.9
Sao Tome & Principe	86.3	..	..	124.7	..	..	143.3	..	..
Senegal	297.9	99.9	327.7	319.0	100.4	366.0	272.3	100.7	328.2
Seychelles	5.4	104.7	5.6	5.7	106.4	6.1	5.3	100.6	5.9
Sierra Leone	31.3	668.7	5.1	58.1	1088.5	6.2	144.9	2296.2	7.7
Somalia	170.5	316.6	59.2	490.7	658.3	88.6	2600.0	1914.8	164.8
Sudan	4.5	247.1	2.0	4.5	403.9	1.3	4.5	630.4	0.9
Swaziland	2.3	140.3	1.8	2.6	154.8	2.0	2.6	174.9	1.8

Table iv.6 contd.

United Republic of Tanzania	99.3	225.8	48.3	143.4	288.9	57.2	195.1	359.4	65.9
Togo	297.9	104.0	314.7	319.0	103.2	356.1	272.3	104.2	317.2
Tunisia	0.9	120.6	0.8	1.0	129.5	0.8	0.9	138.3	0.8
Uganda	106.1	2576.0	4.5	223.1	4900.0	5.2	428.9	5488.0	9.5
Zaire	187.1	510.5	40.3	381.4	1041.7	42.2	718.6	1888.4	46.2
Zambia	8.2	337.8	2.7	12.9	663.5	2.2	29.0	1478.6	2.4
Zimbabwe	1.8	138.1	1.4	2.1	155.9	1.6	2.4	183.0	1.6

The countries with the greatest depreciation in nominal rates in 1989 were Somalia (-65.2 per cent), Uganda (-52.4 per cent) and Zaire (-50.9 per cent). The exchange rate was unchanged in 1989 and 1990 in Djibouti, Ethiopia, Liberia and Sudan. The rand-aligned currencies of Lesotho and Swaziland depreciated by 15.9 per cent and the CFA franc depreciated by 7.1 per cent in 1989. In 1990, the depreciation was greatest in Sierra Leone, Zambia and Uganda, while the rand-aligned currencies appreciated very slightly (1.1 per cent) and the CFA franc substantially (14.65 per cent — the highest of any African currency).

The Government of Angola drew up a plan in September 1990 to introduce a new currency, the kwanza, with a simultaneous devaluation of 50 per cent, in an effort to decrease the exchange rate on the parallel market. The plan was put into effect in mid-March, 1991.

In Sao Tome and Principe, the Government sought in 1989 to keep the official and parallel-market exchange rates within 20 per cent of each other but by 1990 a significant divergence in the two rates had appeared, implying that a substantial devaluation was essential.

In Botswana, the central bank endeavoured to maintain the competitiveness of domestic industry and ease the impact of inflation imported from South Africa by a revaluation of the pula by 50 per cent in June 1989. In September 1990, the pula was devalued by 10 per cent to offset a sharp decline in export earnings.

In Somalia, a dual exchange rate was introduced in March 1989, with foreign exchange auctions held fortnightly. The official rate remained pegged to the Special Drawing Right of IMF (SDR) but was to be used only for external transactions of the central government and for the portion of export revenue that had to be surrendered by exporters.

In Sierra Leone the rate of exchange to the dollar was devalued from 45 leone to Le 65. In January 1990, there was a further devaluation to Le 120.

In Uganda, a policy of periodic adjustment of the exchange rate was adopted. In June 1990, the Government introduced a system of authorized foreign exchange bureaus, with the aim of bringing down the black market rate, so that the difference between it and the official rate lay in the range of 30 per cent.

In Algeria, the depreciation of the dinar by 52 per cent in all, during the period 31 July 1990 to 31 March 1991, succeeded in bringing down parallel-market rates substantially by March 1991, and might eventually lead to near-parity between the two rates.

In Egypt, the central exchange rate to the dollar was devalued in July 1990 from £E1.1 to £E2. That is the rate applicable to receipts from cotton sales, petroleum exports and Suez Canal and pipeline dues. Foreign disbursements and servicing of government debt were effected at the central rates. There was, in addition, a free or commercial market rate of exchange. In July 1989, the special rate for customs valuation was abolished.

In Nigeria, the two exchange rates — the auction and the autonomous — were unified in January 1989, with the inception of the year's budget. Daily auctions were introduced and from August 1989 foreign exchange bureaus for the parallel market were licensed. During 1989 the naira depreciated 30 per cent and a further depreciation occurred in 1990, bringing the rate to the dollar down to N 8.347 compared to \$1.8257 per naira in 1980.

In the United Republic of Tanzania, the shilling was periodically devalued during 1988 and 1990, leading to a narrowing of the differential between the official and parallel-market rates.

In Zambia, the exchange rate was adjusted on 30 July 1989 — one of the periodic changes to keep exports

competitive. In 1990 there were further changes because of large-scale parallel-market dealings. The Government had moved to a more flexible, "crawling peg" regime of depreciation in June 1989. Till February 1990, foreign exchange for loans to finance imports was allocated by the Foreign Exchange Management Committee according to national priorities. On 19 February 1990, the Government agreed with IMF to begin moving to a market-driven structure, although initially there would be a dual system in which the official exchange rate to the dollar (OER) was 25 Zambian Kwacha and the market exchange rate (MER) was ZK 40. The aim would be to adjust the rates so as to narrow the differential between them and achieve a unified market-clearing rate. By December 1990, the MER stood at ZK 48 and that was 15 per cent above the OER. On 1 May 1991 the two rates were merged at a selling rate of ZK 58 and a buying rate of ZK 56, within a regime of open general licensing in which tariffs were the main mechanism for controlling the level of imports.

In Malawi, government policy was flexible in regard to the exchange rate, which continued to depreciate.

In Mauritius, the rupee is linked to a basket of currencies. The rupee depreciated 11.9 per cent in 1989 and 2.7 per cent in 1990.

The currency of Seychelles is tied to the SDR. Its rupee depreciated by 4.8 per cent during 1989 and appreciated by 5.8 per cent in 1990.

A summary look at the countries of the African Financial Community (CFA) may appropriately follow the foregoing account of changes in the nominal exchange rates of other countries. The CFA franc is tied to the French franc (CFAF 50 = FF 1). The imports of CFA countries are mostly from European countries with strong currencies, but their exports are sometimes priced in dollars or sold into countries with weak currencies. That caused problems for countries such as Burkina Faso and the Niger, and for those like Benin which share a border with Nigeria.

2. Effective Exchange Rates

Turning to effective exchange rates, it should be appreciated that the use of 1985 = 100 in deriving them from nominal rates, with the aid of index numbers of consumer prices, carries the implication that the two rates were identical in 1985 because a situation of economic equilibrium existed at that time.

The average effective rate for the region as whole has moved since 1985 in the same direction as the average nominal rate. It showed a depreciation of 15.2 per cent in 1989 and an appreciation of 12 per cent in 1990 against the dollar. Consequently, the ratio of the

effective rate to the nominal rate in the region declined from 89.5 per cent in 1988 to 86.1 per cent in 1989 and further to 80.5 per cent in 1990. That trend suggests a region-wide worsening of exchange-rate parities.

The country with the highest rate of depreciation in 1989 was Algeria, followed by Sierra Leone and the United Republic of Tanzania. Appreciation was greatest in the Sudan, Zambia and Ethiopia. Among the CFA countries, depreciation was highest in Chad (18 per cent) and least for Gabon (5 per cent). 1990 showed the following comparisons: highest rates of depreciation in Uganda, followed by Egypt and Sierra Leone; greatest appreciation in the Sudan, Gabon and Botswana; and appreciation in all the CFA countries — Gabon the greatest (17.3 per cent) and the Niger the smallest (9.3 per cent).

The appreciation of the effective rate in the Sudan and Ethiopia over a period when the nominal rate remained unchanged and the rate of inflation was high, suggests that corrective devaluations may be needed in those countries to achieve a proper alignment of exchange rates.

1. New Developments in Trade Relations

International trade relations are taking a new shape: the trend is towards the constitution of trading blocks and an increase in protectionism. It is in that context that the following developments have to be considered:

- (a) The Gulf crisis;
- (b) The expected single EC market in 1992;
- (c) The reforms in socialist East Europe;
- (d) The trade treaty between USA and Canada;
- (e) The Uruguay round of GATT negotiations;
- (f) The ACP-EEC Lomé VI convention.

The African developing countries, confronted with such a rapidly evolving environment, remain handicapped by the low level of their industrialization and technical capabilities. The share of the region in world exports, for example, is still declining despite the free access of ACP products to the EC market — it was only 1.8 per cent in 1990.

1. The Gulf Crisis

The economic and political fall-out of the crisis which broke out in August 1990 has yet to reach an end. Its effects on the region to date form the subject of comment throughout the present Survey and are not further discussed here.

2. The Single European Market and the East European Reforms

The advent of a single European market in 1992 will lead perhaps to increased protectionism against the exports of African developing countries, which could lose their preferential access. Developing countries elsewhere which possess an efficient and adaptable production structure will be able to benefit from any enlargement of the European market but not the African ones, with their rigid production structures. The region therefore runs the risk of becoming totally marginalized — a process already well advanced. That risk is being magnified as the liberalization of East European markets, which are potentially much more attractive to Western Europe than African ones, gains momentum.

3. The Trade Treaty between USA and Canada

The USA-Canada trade agreement could be the first step towards the constitution in the three Americas and Asia of regional trading blocks in competition with a single European market, wider than EEC, from which the African economies, with their traditional commodity exports and insignificant industrial base could find itself virtually excluded.

It is evident that urgent steps have to be taken to safeguard African interests in this rapidly changing situation. In that connection, Ministers of Trade of African developing countries, meeting at Addis Ababa in November 1989, formulated a number of recommendations which, if implemented, would help in restructuring their international trade. Those recommendations stipulated priority for action in the field of production, as that was the basis for any expansion of trade. They called for less dependence on basic commodities and for the definition of a new framework of trade relations with countries of the North.

4. The Uruguay Round of GATT Negotiations

The Uruguay round of multilateral negotiations within the framework of GATT were intended to provide the fairer trading system which the developing countries had long sought. First, it was planned to widen the liberalization of international trade by extending the scope of GATT to intellectual property rights, to services and to trade-linked investments. Secondly, new approaches were to be worked out for solving the problems encountered by developing countries in commodity markets and the financial and monetary difficulties which they caused. Thirdly a project was put forward for establishing a new system of agricultural trade.

The negotiations came up against the issue of the EEC common agricultural policy (CAP), however, which produced profound disagreement between USA, Canada and most developing countries, on the one hand, and EEC on the other. By setting up a system of subsidies which effectively bars imports from its market and by dumping production surplus to its requirements, EEC protects its own farmers and destroys the profitability of farming in the developing countries. EEC thus contributes willy-nilly to the disruption of world agricultural markets. As a result of the disagreements and despite strenuous efforts from all parties, the Uruguay round has not yet been concluded. All developing countries — and the African ones not least — have a crucial interest in the success of those negotiations, since any further advance of protectionism will hurt them first.

5. The Lomé IV Convention

The Lomé IV Convention, signed on 15 December 1989 and due to remain in force for 10 years, introduced some new elements which are undoubtedly beneficial for all ACP countries. Almost all African developing countries are party to the Convention. However, the over-all package of assistance agreed for Africa at Lomé (12 billion écus) is well below needs and, in particular, rather below the investment requirements of the region. To compensate for that, Lomé IV is remarkable for the high proportion of financial resources provided on concessional terms; for the removal of provisions such as the replenishment of Stabex (see below); and for making resources available for structural adjustment programmes in the form of grants. Furthermore, EEC has recognized the necessity to reduce debt and to orient the adjustment programme towards a country's development.

In the specific area of trade relations, access to the EEC market for some 40 products in the agricultural sector has been improved by the following concessions:

The total dismantling of customs duties on a certain annual volume of exports and a reduction of duties on limited additional exports up to a total quantity which exceeds the aggregate current export capacity of the ACP countries. Protocols in that connection have been signed for products such as rum, beef and veal, and bananas.

The Convention is no longer restricted to agricultural commodities: it now includes metals and other minerals; and it places emphasis clearly on reducing ACP dependence on agricultural exports through diversification.

EEC also agreed to a revision of the protocol on rules of origin to the advantage of ACP countries. In

addition, provision was specifically made to open negotiations with ACP countries on trade in services trade after the conclusion of the Uruguay round.

The Stabilisation of Export Earnings scheme (Stabex) has been revamped: its risk coverage has been extended and fairer and more transparent rules of operation introduced. The Special Financing Facility for Mining Products (Sysmin) has been simplified and

two new products included: uranium and gold.

Despite the above changes of a positive nature, it has to be recognized that the Lomé Convention, model IV, is still not the type of trade and co-operation agreement which can ensure a stable and mutually beneficial relationship between African developing countries and their EEC partners.

V. FOREIGN MERCHANDISE TRADE

A. Value and volume of trade

The recession in the industrialized countries and the Gulf crisis are the events which most influenced the external sectors of African developing countries in 1990. The recession depressed demand for their commodity exports, while the rise in oil prices caused by the crisis simultaneously boosted oil exporters' revenues and increased the import bills of oil importers.

Table V.1 below presents the salient features of the evolution of merchandise trade in 1988-1990. The value of that trade rose strongly in 1990. The countries of the region increased their exports by 22.4 per cent from \$60.8 billion in 1989 to \$74.5 billion, the highest figure attained since 1982. That increase resulted from a 12.8 per cent increase in unit values and an 8.5 per cent increase in volume. Expenditure on imports rose by 12.7 per cent in 1990 to \$75.6 billion from 67.2 billion in 1989; import volume grew by 3.2 per cent while unit prices rose by 9.1 per cent. Consequently, the merchandise trade deficit fell considerably — from \$6.4 billion to \$1.2 billion. Since export prices increased faster than import prices, the terms of trade improved by 5.4 per cent and the purchasing power of exports by 14.4 per cent.

Table V.1 Foreign trade of African developing countries, 1988-1990 (Percentage annual change)			
	1988	1989	1990
Exports			
Value	5.4	14.5	22.4
Volume	6.6	-0.3	8.5
Unit value	-1.1	14.8	12.8
Imports			
Value	10.0	2.0	12.7
Volume	2.4	2.8	5.3
Unit value	7.4	-0.8	7.0
Terms of trade	-7.9	15.7	5.4
Purchasing power of exports	-2.0	15.4	14.4
Sources: ECA estimates, based on IMF, <i>International Financial Statistics</i> , various issues; IMF, <i>World Economic Outlook (October 1990 and April 1991)</i> ; United Nations Conference on Trade and Development (UNCTAD), <i>Handbook of International Trade and Development Statistics, 1989</i> ; United Nations, <i>Monthly Bulletin of Statistics</i> , various issues; and national sources.			

The percentage share of the African developing countries in world merchandise exports diminished from 2.0 in 1988 to 1.9 in 1989 and to 1.8 in 1990. It should be recalled that in 1980 their share had been as high as 4.8 per cent.

The value of exports regained the high 1982 level in 1990 almost entirely because of the effect of the Gulf crisis on the oil market, just as its decline in 1986 had been the consequence of the collapse of oil prices in that year and as the subsequent recovery resulted mainly from oil prices regaining the ground lost. Immediately after the invasion of Kuwait by Iraq, the withdrawal from the market in obedience to the United Nations embargo on supplies from both Kuwait and Iraq, reinforced by concern that a shortage might possibly occur, brought oil prices to a peak of more than \$40 a barrel by early October. Prices eased afterwards, when OPEC suspended its quota system and allowed increased production. Nevertheless, the average price per barrel increased by 31.7 per cent to roughly \$24 for Brent Crude, compared to \$18.20 in 1989. The total export revenues of the major regional oil exporters shot up by an estimated 27.9 per cent, as production increased simultaneously with prices — to \$51.4 billion, compared to \$40.2 billion in 1989 (see table V.2 below for the details by country). In contrast, export revenues of oil importers improved by only 7.5 per cent, to \$23 billion in 1990 from \$21.4 billion in 1989. Commodity prices generally were unfavourable, since world-wide recession cut into demand: the ECA price index of commodities, excluding oil, showed a decline of 4.8 per cent in 1990.

Import values were boosted by inflation in industrialized countries, which made for a rise of 7 per cent in import prices in 1990, whereas they were stable in 1989. On the other hand, in oil-exporting countries the increase in revenue stimulated imports. Many of the latter countries had had to squeeze imports until 1987, when higher oil prices began to enable them gradually to increase their purchases from abroad. Their imports increased in value by 18.3 per cent in 1990, while those of the remaining countries of the region increased by 5.1 per cent only. In the latter case, because of higher import prices, that meant a net reduction in volume terms.

Table V.2
Total exports major African oil exporters, 1988-1990

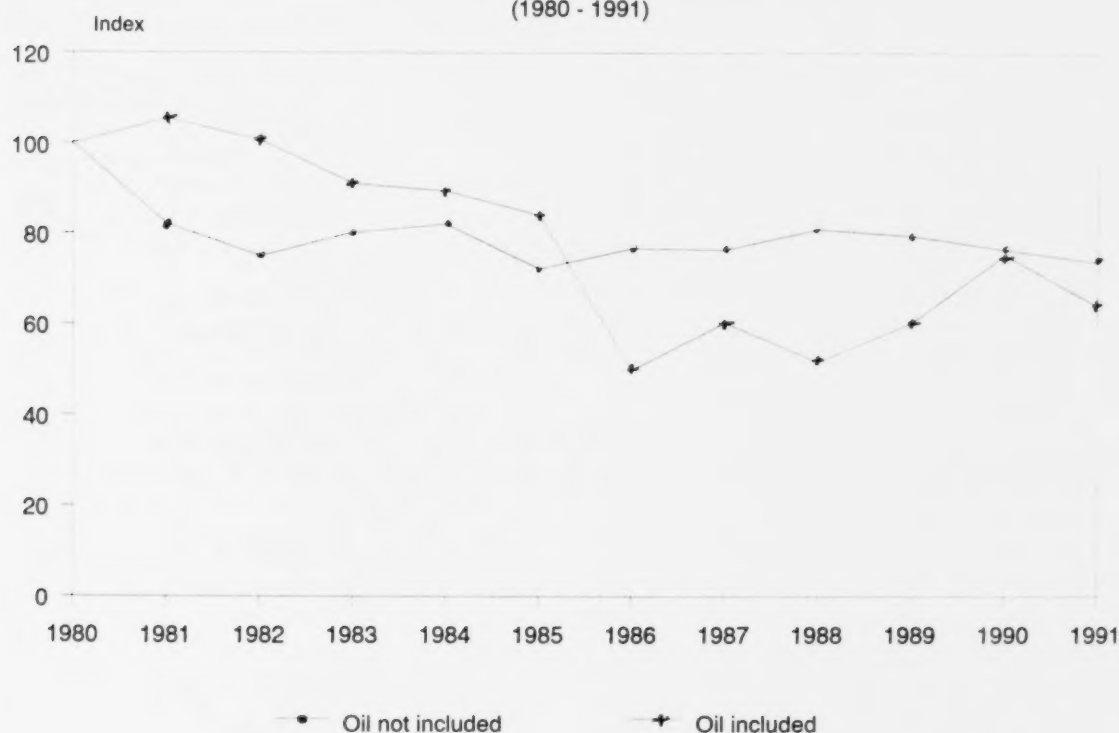
	1988	1989	1990 a/	1989-1990 percentage increase
Billion dollars				
Algeria	7.6	9.5	12.3	34.
Angola	2.9	3.3	3.4	2.
Cameroon	1.1	1.2	1.3	7.
Congo	0.8	0.9	1.0	8.
Egypt	3.7	5.1	5.8	13.
Gabon	1.2	1.6	2.3	47.
Libyan Arab Jamahiriya	5.6	7.8	11.0	41.
Nigeria	7.4	7.9	10.9	37.
Tunisia	2.4	2.9	3.2	9.
Total	32.7	40.2	51.4	27.

Source: IMF, International Financial Statistics and ECA estimates
a/ Preliminary estimates

B. International trade prices

As already indicated, economic activity worldwide slowed down in 1990. At the same time, according to IMF²⁵, world trade grew by only 3.9 per cent in 1990 compared to 7.1 per cent in 1989. The negative effect on exports of minerals and other primary commodities by African developing countries was entirely predictable. Although the ECA wholesale price index for traded commodities registered a substantial rise (22.7 per cent) in 1990, the cause was essentially a 31 per cent rise in the price of oil: if that is excluded, the resultant sub-index shows a decline of 4.8 per cent (see table V.3 below).

Fig.4: Wholesale prices, 1980=100
(1980 - 1991)



25 IMF, *World Economic Outlook* (Washington DC, May, 1991).

Table V.3
Wholesale price indices for selected commodities and commodity groups, 1988-1990
(1980=100)

Price basis a/		1988	1989	1990
Petroleum	North Sea Brent	46.9	58.6	72.0
Coffee	Uganda (New York)	64.6	51.4	36.8
Cocoa	New York and London	60.8	47.7	48.0
Cotton	Egypt (Liverpool)	142.3	188.5	195.5
Groundnuts	European ports	58.4	59.2	59.0
Tea	Average auction price (London)	80.3	90.3	88.3
Sugar	EEC (London)	107.8	104.0	112.0
Logs	Malaysia (Tokyo)	119.4	114.6	107.0
Phosphates	Morocco (Casablanca)	74.4	87.4	86.7
Iron Ore	Brazil (North Sea ports)	84.9	96.9	107.1
Copper	(London)	119.0	130.3	122.7
ECA index:				
All items		52.8	63.3	74.1
Non-oil commodities		88.0	90.9	86.5
Metals and other minerals		93.8	104.3	100.5
Beverages		64.0	52.0	43.3
Source: IMF, International Financial Statistics; UNCTAD, Monthly Commodity Price Bulletin and ECA estimates. For petroleum prices, The Economist magazine, London.				
a/ Description/origin of commodity and (in brackets) delivery location for which price is quoted.				

1. Metals and non-metallic minerals

The three-year bull market in metals and non-metallic minerals came to an end in 1990, with declining prices for copper (which carries a large weight in African trade), nickel, iron ore, aluminium and silver. The sub-index number for prices of those commodities declined by 3.6 per cent and that for copper alone by 6.6 per cent. Increases were recorded, however, for cobalt (27.7 per cent), iron ore (10.7 per cent) and bauxite (1.6 per cent).

2. Beverages

The sub-index number for prices of beverages declined a further 15.4 per cent in 1990, because of a 27.6 per cent fall in coffee prices from an average per lb of \$0.76 in 1989 to \$0.55 in 1990. Tea prices were virtually stagnant in 1990 at \$0.92 cents per lb.

The International Coffee Organization (ICO) agreed in September 1990 to extend the International Coffee Agreement for one year but without a price support mechanism. Prices had fallen by about 50 per cent since the ICO export quota system was suspended in July 1989. One ray of hope for exporters was the decision by Brazil in March 1991 to limit its supply of coffee to world markets in order to boost prices. It is not clear, whether that would strengthen prices for African exporters, since they grow mainly robusta

coffee, whereas Brazil is the major supplier of the higher-priced arabica, for which demand is stronger, especially in North American markets. What is clear, however, is that the price gains (if any) arising from the temporary market disruptions induced by Brazil would be no substitute for a stable, long-term price-support arrangement under the auspices of ICO.

Cocoa prices increased by 2.2 per cent in 1990, after five years of decline, to an average per lb of \$0.575 — which was only 52 per cent of the peak price for the decade of \$1.09, recorded in 1984. The International Cocoa Organization (ICCO) failed to revive the International Cocoa Agreement at its September 1990 meeting. The launching of a new agreement remains contingent on the clearing of debts exceeding \$150 million owed to ICCO by producer countries. However, prices may strengthen in view of the fact that a smaller crop was predicted for 1990/1991.

3. Cotton

In contrast, cotton prices were favourable, the Egyptian variety gaining a further 3.6 per cent in 1990. Buoyant world demand for cotton has pushed up prices in the face of limited supply.

4. Sugar

Sugar was another commodity which, at least in the early part of 1990, appeared to resist the general downward trend in prices. After rising sharply, however, the free market price tumbled to around \$.09 per lb by the end of the year on expectations that, worldwide, there would be a bumper crop.

C. The commodity structure of trade

The latest available statistics (for 1989) do not indicate any fundamental changes in the commodity structure of trade of the African developing countries. Exports are dominated by primary commodities and imports by manufactured goods. There were some significant changes, however, induced by price movements and other factors. Table V.4 below summarizes the information in respect of 1980, 1988 and 1989 by five broad commodity groupings.

products). Oil production increased by nearly 12 per cent in 1990, on top of which high prices ruled in the second part of the year. Most oil exporters rushed to benefit from the windfall and exports of crude may well have risen as fast as production, probably to over 220 million tons.

In some countries, however, the limits on production capacity and rising domestic consumption prevented the achievement of an increase in exports: such was the case in Egypt, where exports dropped by 40 per cent in 1990 to only 104,000 barrels a day. Egypt was able to increase its exports of refined petroleum, however. Algeria, on the other hand, was able to boost exports of crude considerably, as well as those of gas, which has become as large a revenue-earner as oil. In Nigeria, exports of crude reached \$13.3 billion in 1990, compared to \$7.5 billion in 1989.

Table V.4
Commodity structure of the trade of African developing countries, 1980 and 1988-1989
(Percentage)

	Exports			Imports		
	1980	1988	1989	1980	1988	1989
Food, beverage & tobacco	9.9	17.5	14.1	14.3	15.2	15.0
Crude materials	7.3	12.7	10.1	4.3	5.4	5.8
of which:						
Textile fibres	1.3	4.0	2.0	0.6	0.9	1.0
Metals	2.0	2.0	2.2	-	-	-
Other mineral and fertilizers	1.5	1.8	1.7	0.5	0.3	0.7
Mineral fuels	75.6	50.2	54.4	9.3	7.3	7.4
Chemicals	0.8	4.8	4.0	7.9	9.8	9.6
Machinery and transport equipment	0.4	1.4	1.6	37.4	37.2	35.8
Other manufactures	5.2	15.4	15.0	24.7	24.3	25.0
Total a/	100.0	100.0	100.0	100.0	100.0	100.0

Source: United Nations, Monthly Bulletin of Statistics (May 1991), Vol. XLV, No.5

a/ Including unclassified commodities.

1. Exports of mineral fuels

The share of mineral fuels in the aggregate exports of all African developing countries declined from 75.6 per cent in 1980 to 54.4 per cent in 1989. That result was essentially the result of price changes: oil and other hydrocarbons remain the most important export product and the price of oil in 1989 was only 59 per cent of its level in 1980. The value of exports of crude oil fell from \$71.2 billion in 1980 to \$31.4 billion in 1989, or by 55.8 per cent, while their volume declined by only 10.6 per cent. In 1989, exports of crude oil totalled 199.1 million tons, to which must be added 34.4 million tons of oil products (basically, refined

2. Exports of crude materials

(a) Metals

Among non-oil minerals, copper is the most important in the trade of the region. In 1990, there were production difficulties in Zaire and Zambia, the main suppliers (see chapter VI below). With lower copper prices in 1990, the value of exports by the two countries fell from \$2.4 billion in 1989 to \$1.96 billion, nearly 70 per cent of the reduction falling on Zaire).

The same two countries are the main cobalt producers of the region. With favourable prices and higher production, the value of exports may have reached \$361 million in 1990 compared to \$259 billion in 1989.

(b) Exports of textile fibres

Constituting 2.2 per cent of total exports in 1989, textile fibres are an important agricultural export of African developing countries. With demand for cotton increasing worldwide, prices were favourable in 1990. That would have boosted exports, but for the fall in production in the two main producing countries, Egypt and the Sudan. Following a catastrophic famine, the Sudanese Government stated its intention to switch emphasis from cotton to wheat production.

3. Exports of food, beverages and tobacco

Food, beverages and tobacco represented 14.1 per cent of exports in value terms in 1989, the major part being contributed by beverages, i.e., coffee, cocoa and tea. Exports of food products were in decline. According to FAO, green coffee, cocoa beans and tea represented 37.5 per cent of total agricultural exports in 1989. Coffee exports, which had peaked at \$3.4 billion in 1986, were down to \$1.9 billion in 1989; and those of cocoa beans were down to \$1.4 billion in 1989, compared to \$2.2 billion in 1986 and \$2.4 billion in 1980. Tea exports reached \$369.5 million in 1989, rising from \$318.2 million in 1988, but were below the peak of \$458 million attained in 1984. In 1990, in view of the further decline in cocoa and coffee prices, the value of exports must have again dropped. The losses involved must in any case have been considerable. Ethiopia, which obtains most of its export revenues from coffee, saw the value of coffee exports fall from \$292.5 million in 1989 by more than 50 per cent to only \$131.1 million in 1990. In Uganda, another country dependent on coffee exports, that source of revenue declined from \$240 million in 1989 to only \$137 million in 1990. In Côte d'Ivoire, the loss

of export revenues from coffee and cocoa combined fell in spectacular fashion from \$1.5 billion in 1985 to \$1.0 billion in 1989.

4. Exports of manufactured goods

One encouraging trend has been the rise in the share of other manufactures in total exports from 5.2 per cent in 1980 to 15 per cent in 1989. The value of those exports grew from \$5,305 million in 1980 to \$9,319 million in 1989, which shows that their volume also grew, in that the United Nations index for the price of manufactured goods increased by 21 per cent in the period 1980-1989. It is necessary to exercise some caution in interpreting those figures, however: a few countries — Egypt, Mauritius and Tunisia — account for most of the exports of industrial goods and mainly such articles as textiles are involved. The great majority of African developing countries, far from succeeding in expanding exports of manufactured goods, have lost ground.

5. Imports

On the import side, 1989 figures indicate that the weight of manufactured goods is as high as before, machinery and transport equipment accounting for 35.8 per cent and other manufactures for 25.0 per cent. However, the value of those imports has fallen since 1980: machinery and transport equipment imports were valued at \$31.6 billion in 1980 but amounted to only \$25.2 billion in 1989; and for other manufactures the figure was \$17.7 billion in 1989 compared to \$20.9 billion in 1980. Those trends show the depth of the African crisis during the 1980s, particularly the contraction of investment which ensued. A disturbing trend is the continued increase of food imports: according to FAO they have grown in volume by 10 per cent since 1980, while exports fell by 9.7 per cent; on a long-term basis, the volume of food exports is 10 per cent lower than in 1961, while imports have more than doubled.

D. The direction of trade

No basic changes appear to have occurred in the direction of trade of the countries of the region, taken as a grouping: developed market economies continued to dominate the picture. In 1990, they absorbed 79.7 per cent of exports and supplied 72.4 per cent of imports (see table V.5 below). The European countries among them occupied a leading position, with 60.0 per cent of exports and 59.4 per cent of imports. However, on a long-term perspective it appears that the overwhelming position of the developed market economies is being slowly eroded. In 1980, for example, they had supplied 83.6 per cent of exports and 77.9 per cent of imports, so that there has been a decline of 4 and 6 percentage points, respectively. That trend is in part the result of the diminished share of USA, which took 31.1 per cent of exports in 1980 and only 15.5 per cent in 1990.

The counterpart of that long-term trend was the greater importance of the trade of African developing countries with each other and with other developing regions. The share of such trade in the total rose from 12.6 per cent in 1980 to 14.8 per cent in 1990 in the case of exports and, most importantly, from 15.6 per cent in 1980 to 22.7 per cent in 1990 in the case of imports. The Asian NICs, in particular, China (Taiwan), Hong Kong, the Republic of Korea and Singapore, became important suppliers of a range of manufactured goods, including high-technology electronic goods. Remarkably, the trade among African developing countries has shown considerable improvement: while the export share lay in the range 6.6-7.5 per cent in 1988-1990, it had been only 3.1 per cent in 1980; and the import share of 5.3-6.2 per cent in 1988-1990 compares with only 3.5 per cent in 1980.

Table V.5
Direction of African trade of African developing countries, 1980 and 1988-1990
(Percentage by value)

	Exports				Imports			
	1980	1988	1989	1990	1980	1988	1989	1990
Developed market economies	83.6	75.6	76.6	79.7	77.9	70.3	69.9	72.4
of which:								
Europe	49.6	55.8	55.4	60.0	59.7	53.8	53.1	54.4
EEC	42.8	54.3	53.8	59.0	51.1	49.5	48.9	50.3
USA	31.1	14.7	15.7	15.5	7.5	7.7	8.6	8.0
Japan	2.1	3.0	2.6	2.3	7.1	5.4	4.9	5.0
Centrally planned economies	2.9	5.7	5.4	4.2	6.5	8.4	7.9	9.5
of which:								
USSR	0.8	2.3	2.1	2.1	1.6	2.3	2.1	3.7
Others	2.1	3.4	3.3	2.1	4.9	6.1	5.8	5.8
Developing market economies	12.6	16.7	16.4	14.8	15.6	21.3	22.2	22.1
of which:								
African	3.1	6.6	7.5	6.6	3.5	5.3	6.2	5.4
American	6.4	2.0	2.0	1.6	2.8	2.3	2.1	1.8
Asian	3.1	7.2	6.2	5.9	9.2	12.6	12.9	14.1
Total a/	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Source: United Nations, Monthly Bulletin of Statistics, June 1990								
a/ The percentages of the economic groupings do not add to 100 because the direction of some trade is unclassified.								

The intra-regional trade appears to be well spread across the commodity categories of food, beverages and tobacco; minerals and fuels; and manufactured goods. Table V.6 below shows the distribution by value and percentage for the years 1987 and 1988, the most recent years for which fairly comprehensive data are available.

Table V.6
Trade among African developing countries by
commodity class, 1987 and 1988

	1987		1988	
	Million dollars	Percentage	Million dollars	Percentage
Food, beverages and tobacco	786	25.6	856	23.4
Oils and fats and other crude materials	341	11.3	407	11.1
Minerals, fuels and related materials	874	28.8	1055	28.8
Machinery and transport equipment	194	6.4	294	8.0
Other manufactured goods	574	18.9	727	19.9
Total	3030	100.0	3661	100.0
Source: United Nations, Monthly Bulletin of Statistics, May 1990 and ECA estimates.				

While trade among African developing countries was greater in 1989 than in previous years, its volume and importance remain well below what is desirable. Admittedly, the value data are certainly underestimates. Substantial traditional trade movements, such as the cattle trade between the countries of the Sahel and those of the Gulf of Guinea, are not properly recorded; and there is considerable smuggling activity in view of the permeability of frontiers and the inability of Governments to exercise control over them.

Nevertheless, despite preferential trade agreements and customs and economic unions, considerable obstacles to intra-regional trade remain, particularly the prohibitive level of many tariffs and the absence of a common currency or — even more relevantly — of convertible currencies in the region. Even within the CFA in West and Central Africa, with its common currency, Governments erect barriers to hinder the movement of goods across their frontiers on the ground of the need to protect their industries, but chiefly to protect their customs revenues, which are a crucial part of their fiscal resources. Clearly, further efforts have to be made to solve those problems and to implement the recommendations approved by African States on the promotion of intra-African trade.

VI. FINANCIAL POLICIES

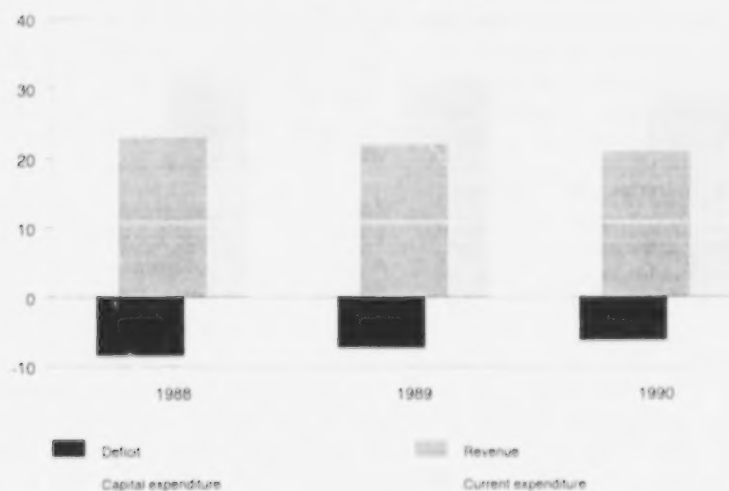
The close inter-connection of fiscal, monetary and consumer price developments is clear in developing Africa, as in other regions, provided that they are examined in relation to the weak, but rigid, structure of African economies. The attempt of Governments to achieve a type of structural transformation which would not endanger the fiscal and financial balance — and yet would protect the society from internally and externally generated instability — imposes a considerable strain on the narrow, unstable tax base and the very thin money and capital markets to be found in Africa. Monetary policy turns out to be an adjunct of fiscal policy rather than an independent instrument for economic stabilization and transformation. The two fundamental determinants of money supply in developing Africa are the volume of credit made available to the Government and movements in net foreign assets. When government revenue improves, there is an opportunity to restrain monetary growth, since the borrowing requirement of the public sector is reduced; and the reverse applies when it deteriorates. However, an improvement in the fiscal position does not necessarily guarantee that monetary expansion will be constrained: an increase in net foreign assets would normally be translated into increased liquidity.

During the year (1990) under review, while the fiscal position of African developing countries on aggregate improved, there was a high rate of monetary

expansion as a result of two distinct sets of experiences. In the oil-exporting countries, government revenue increased, relieving the pressure for money supply to expand that emanated from public-sector borrowing. However, that was counterbalanced by the increase in foreign assets, which tended to increase the money supply. In the non-oil exporting countries, on the other hand, the monetary institutions were called upon to make available a larger volume of financial resources to cover the gap between revenue and expenditure. In both groupings, the expansionary monetary situation put an additional pressure on prices, though inflation rates were lower on average than in 1989.

Generally, the countries of developing Africa followed an austere policy of increasing revenue and decreasing current expenditure; they allocated more resources to service external debt and took steps to increase productive capacity by allocating larger resources to investment. Because of both external and domestic factors, the outcome fell short of those worthy intentions.

Fig. 7. Developing Africa, Fiscal Indicators 1988-1990
(per cent of GDP)



A. Fiscal Developments

1. Revenue

Table VI.1 below shows the frequency distribution of the annual rates of growth of government revenue for selected countries of the region during 1987-1990. In 19 of 43 countries, revenue declined in absolute terms in 1990, while in 11 others the rate of growth was lower than the average rate of inflation, so that revenue declined in real terms. Thus, for 30 of the 43 countries the Government collected revenue whose purchasing power was lower than in the previous year.

Table VI.1 Frequency distribution of selected African countries according to percentage growth of government revenue, 1987 - 1990				
	1987	1988	1989	1990
Negative	13	10	16	19
0-4.9	5	7	5	6
5-9.9	6	7	4	5
10-19.9	6	6	6	4
20-29.9	2	4	-	3
30 and over	14	10	4	6
Number of countries surveyed	46	44	35	43
Source: ECA Secretariat; and country reports				

For nine countries the growth rate in 1990 was more than 20 per cent; for six of them — Algeria, Cameroon, the Congo, Gabon, the Libyan Arab Jamahiriya and Nigeria — it was more than 30 per cent, a truly impressive achievement. Unfortunately, even for the latter countries (all of them oil exporters), the impressive growth in government revenue was less encouraging than in the countries with modest, but real, rates of growth, since in the former case the additional income was only a windfall from the bonanza of higher oil prices. One is forced to view such extra revenues with an element of reasoned caution: a decline in the price of oil when the price boom ends in a downturn is likely to cut into them and drive the countries concerned into financial difficulties.

For the non-oil exporting countries, the additional burden of servicing a higher-than-average oil bill was compounded by depressed commodity prices; by lower export earnings which enforced lower import volume; and by the generally sluggish domestic economic activity which resulted and, in its turn, dampened revenue. The fall in the world prices of minerals, coffee and cocoa contributed to the decline

in 1988 and 1989 in the government revenue of the economies dependent on those exports.

A review of the revenue policies of Governments shows how difficult their predicament was. They all had higher revenue as an objective but different approaches were adopted for achieving it.

In many countries, various tax rates were reduced in 1990 in the hope of regenerating growth, diminishing fiscal evasion and thus increasing revenue. In Ethiopia, the top marginal tax rate for businesses was reduced from 89 per cent to 59 per cent on annual incomes in excess of \$18,000 and income tax on company dividends was reduced from 25 per cent to 10 per cent. In Tunisia, the top marginal rate of income tax was scaled down, from 68 per cent to 35 per cent. In Malawi, corporate and personal tax rates were reduced by 5 percentage points to 45 per cent and the income threshold above which they applied was raised by 50 per cent. In Kenya, taxes on exports as well as on imports of intermediate inputs were reduced in the hope of boosting the "export-led growth" of the economy; in addition, the maximum rate of corporate tax was reduced from 55 per cent to 40 per cent.

On the other hand, a good number of countries increased taxes to enhance their revenue position and dampen demand. In Ghana, sales taxes ranging between 50-500 per cent were introduced and the petrol tax was increased by 30 per cent. In the Seychelles, additional import duties on alcohol, tobacco, electronics and other luxury items were imposed.

The fiscal stance in the oil-exporting countries has obviously been one of retrenchment. It seems to have been influenced by past experience, particularly that of the early 1980s, when the oil bonanza proved counter-productive. Despite increases in revenue from petroleum profits tax, rents, royalties and related earnings, those countries pursued a fiscal policy of contraction. Algeria introduced new taxes not related to oil — on the purchase of alcoholic drinks, betting on sporting events and hiring video cassettes. In Nigeria, taxes on and prices of public utilities such as electricity were increased.

Table VI.2 below shows the evolution during 1988-1990 of major fiscal indicators for developing Africa related to government revenue. The indicators take the form of percentage ratios, the national data being weighted according to the share of each country in the total for developing Africa.

Table VI.2
Major fiscal indicators in developing Africa, 1988-1990*
(Percentage)

	1988	1989	1990
Revenue/GDP	25.0	24.4	23.0
Proportion of revenue contributed by:			
Indirect taxes	38.6	36.7	39.5
of which:			
Taxes on foreign trade	19.6	17.6	22.5
Expenditure/GDP	33.5	31.5	30.0
Current expenditure/GDP	23.0	22.0	21.0
Proportion of current expenditure allocated to:			
Education	17.6	14.2	6.0
Health	4.7	5.9	5.4
Transport and communications	3.5	14.3	1.7
Agriculture	4.3	3.4	1.3
Public debt service	26.7	27.9	34.9
Capital expenditure/GDP	10.5	9.4	8.7
Overall deficit/GDP	8.5	7.4	6.3
Proportion of deficit externally financed	47.6	48.3	43.4

Source: ECA Secretariat and country reports.

* Weighted average of data in budget estimates for fiscal years beginning in the calendar years shown.

The ratio of revenue to GDP declined slightly from 24.4 per cent in 1989 to 23 per cent in 1990. The share of indirect taxes in total revenue rose to nearly 40 per cent due to more buoyant economic activity and to more efficient tax collection. The rise compared to 1989 was more than accounted for by the higher share of taxes on international trade — up nearly 5 percentage points — reflecting the large increase in oil exports.

2. Expenditure

Expenditure trends were determined by the financial capacity of national economies, as is natural, but also by policies directed specifically at structural adjustment and economic reform. Many countries were implementing economic reform programmes, all of which included provisions for greater budgetary restraint, if not outright reduction of expenditure.

Table VI.2 also shows fiscal indicators related to expenditure. The weighted average ratio to GDP fell from 31.5 per cent in 1989 to 30 per cent in 1990. The decline was common to North Africa and West Africa but not the subregions of Central Africa and East and southern Africa. It is noteworthy that even in oil-exporting countries, despite the windfall produced by the Gulf crisis, expenditure as a proportion of GDP fell to 34 per cent from 35 per cent in 1989, whether calculated by reference to current or to capital

expenditure. The latter amounted to only 9 per cent of total expenditure in 1990, whereas it had represented over 14 per cent in the early 1980s.

In some countries beset by acute economic difficulties the cut in expenditure was drastic. In Côte d'Ivoire, which suffered a recession in 1990, the recovery programme instituted by the Government cut public expenditures by CFA 234 billion — equivalent to nearly \$900 million and representing 8.5 per cent of GDP. The severity of that reduction was prompted by the fall in export revenues and by debt-service obligations: Côte d'Ivoire ranks among the most indebted countries in the region. The reduction was made possible by the discovery and elimination of fictitious names on the payroll of civil servants; by employing fewer technical assistants; by selling some 4,000 government-owned vehicles; and by similar other measures. In Cameroon, even though expenditures increased by an estimated 4.1 per cent in 1990 to CFA 624.5 billion, that represented a decrease of 22 per cent compared with expenditure estimates of CFA 800 billion in 1987.

Even where expenditure estimates were raised for 1990, the increase was modest compared to previous years. In Burkina Faso, they represented growth of only 2.1 per cent, whereas growth had been 11.3 per cent in 1989 — and there had been a jump of 39.4 per cent between 1986 and 1989. The country suffered a recession in 1990 and is applying an adjustment programme sponsored by the World Bank. In Mali, expenditure growth was estimated at only 2.2 per cent in 1990, the Government pursuing a policy of austerity which included freezing its own wage bill. In some other countries, a high rate of inflation nullified or reduced the nominal increase in expenditure. For example, the 1990 budget of Zaïre provided for a 67 per cent increase in expenditure in the context of an estimate that there would be 50 per cent inflation. In the event, the rate of inflation was 81.3 per cent and expenditures declined in real terms. In Sierra Leone, the 1990 budget provided for current expenditure to increase by 21.9 per cent and investment by 30 per cent, leading to a rise in total expenditure of 22.9 per cent. To compensate civil servants for the effects of inflation, public-sector wages were raised by 50 per cent. Since the actual rate of inflation was 110 per cent, expenditures in real terms may have slumped by more than 40 per cent in 1990. The need to contain inflation figured prominently in the reasons invoked by Governments to reduce or control expenditure. In Uganda, the Government aimed at reducing inflation to 30 per cent in 1990 and planned for expenditure to remain constant in real terms.

The servicing of external debt figured prominently in national budgets. In Morocco, the pressure exerted by the size of that requirement was one of the main causes

of increased expenditures, despite the relief provided by debt rescheduling. Within an expenditure estimate of 67.9 billion dirhams for the 1990 budget, 9 per cent less than in 1989, debt service was set at Dir 22.4 billion, Dir 2.4 billion more than in 1989 and double the 1985 amount. In Zaire, external debt service increased nominally by 78 per cent in 1990 to 188 billion Zaire or \$262 million.

In Nigeria, the 1990 budget was relatively cautious: expenditure was to be reduced by 3 per cent to 39.8 billion nairas — the current expenditure estimates being cut by nearly N 3 billion. However, investment was to be increased by nearly N 2 billion from N 9 billion in 1989. The net effect would be to reduce the deficit and thus the rate of inflation. In the event, the Gulf crisis windfall brought in unexpected revenues and actual expenditures overshot estimates by some N 22.3 billion.

In some other oil-exporting countries (e.g., Gabon, the Congo, Cameroon) the 1990 budget expenditure estimates were marked by austerity. Furthermore, they were revised downwards prior to the outbreak of the Gulf crisis. In Gabon, current expenditure was set initially at CFA 400 billion, a modest increase of CFA 50 billion, and the investment budget increased by 18.4 per cent. That represented a far cry from budget-making in previous years. Subsequently, while unrest gripped the country, the budget was revised downwards to CFA 313.7 billion, which was under half the CFA 808.6 billion reached in 1985. After August 1990, the expectation of high revenues from oil exports led the Government to some relaxation of austerity in the preparation of the 1991 budget estimates, particularly with regard to wages, but there was no return to pre-1989 levels. Gabon is bound by commitments to economic reform and faced substantial requirements for debt service — an estimated CFA 192.4 billion for 1990.

In the Congo, the 1990 budget provided CFA 187.6 billion for debt servicing. Ordinary expenditures (interest excluded) were cut by 8.6 per cent to CFA 131.8 billion, involving a frozen wage bill; and investment expenditure was cut down to only CFA 35.5 billion. Such a degree of austerity could not be

sustained in the context of swift political change in the country: by the end of the year, a new cabinet rescinded the wage freeze and proceeded to hire several thousand jobless graduates.

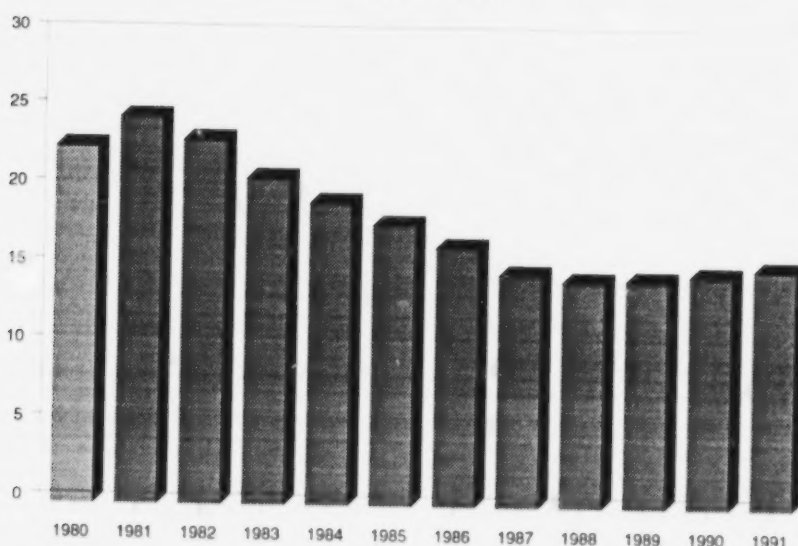
In Egypt, the main concern was to control the budget deficit and the rise in expenditure was kept down to 16.2 per cent, against an anticipated rate of inflation of 20-30 per cent.

In Zimbabwe, with the same concerns, the Government limited the rise of expenditure to 15 per cent, while revenue growth was estimated at 22 per cent.

In Mauritius, a country which, in the words of its Prime Minister, was making the transition from a manpower economy to a high technology one, the budget was designed to avoid overheating and, in particular, to control the rise in wages, which threatened to price Mauritian products out of the world market. A pay freeze was therefore introduced and expenditure growth set at 13 per cent below the rate of inflation.

Investment expenditure in the region declined proportionately more than current expenditure. That is quite understandable since the former tends to be easier to cut than expenditure on personnel, for example — which is highly sensitive socially and politically. When current expenditure is analysed by function, it is clear that the share of education, health, or agriculture did not change significantly: it even edged down somewhat, rather a disturbing development. It is remarkable, that despite years of efforts to boost agriculture, current expenditures on the sector still remain stuck at 4 per cent of the total. On the other hand, in some countries defence expenditures continued to soar because of civil war or of external commitments, a development which had tragic consequences in such poor countries as Ethiopia, Mozambique and the Sudan. In those three countries taken together, defence expenditure increased from 16.2 per cent of current expenditure in fiscal 1982 to 22 per cent in fiscal 1989, whereas their expenditure in 1989 on social services and economic services accounted for 4.1 per cent and 4.3 per cent, respectively.

Fig. 8: Investment ratio, at 1980 prices (1980-1991)
(per cent of GDP)



The region allocated a very large proportion of current expenditure to the servicing of public debt: it rose sharply to 35 per cent in 1990 and was evidently a heavy burden (even granted that actual disbursements were well below the budget estimates). In that connection, the decision of the Government of France to write off a large part of its loans to African countries had a significant favourable effect on the fiscal balances of the CFA countries, which had experienced an acute banking crisis in 1989-1990. Because of irrecoverable loans on their balance sheets and a severe liquidity shortage, several banks in many countries — even in Côte d'Ivoire — were restructured or closed.

Expenditure on wages and salaries represented 40 per cent or more of budgets at the beginning of the 1980s and had for long been considered excessive. Reducing those expenditures or at least stabilizing them was one of the key objectives of adjustment programmes. The evidence would suggest that it is being attained, in that the percentage apparently fell, on average, to around 35 per cent in 1990.

Governments made strenuous efforts to trim expenditure on personnel. Civil service censuses rooted out ghost civil servants, who in some cases represented up to two thirds of those on the rolls; salary scales were frozen or salary increases kept below the rate of inflation; and civil servants were offered incentives to retire early. However, it must not be forgotten that Governments have to provide education and health services to populations which are growing rapidly and are also very poor. In the medium term it will be difficult to avoid increases in civil service ranks,

at least in such basic services. Moreover, government employees represent in developing Africa the largest group numerically — or at least the most important one — among wage earners. A cut in the government wage bill has therefore considerable macroeconomic effects, not to speak of the social ones. That explains why measures to cut the civil service aroused considerable resistance and have achieved only modest success to date.

3. Budget deficits

The evidence seems to indicate (see table VI.6 above) that budget deficits as a proportion of GDP declined from 7.4 per cent in 1989 to 6.3 per cent in 1990. It had been as high as 11 per cent in the middle of the 1980s. Those ratios mainly relate, however, to budget estimates, not to actual expenditures — which were usually higher. Furthermore, they do not take into account extra-budgetary expenditures, which can be very substantial in some countries. Despite those reservations, the trend in the region towards a reduction in the deficits of national budgets is undeniable and it is, after all, a major objective of most Governments.

In some countries, evidently, actual reductions were not achieved. In the Sudan, where a deep economic recession was aggravated by famine, the rate of inflation was such that, just to keep real expenditures from falling, nominal deficits had to rise. Even then, however, they fell as a proportion of GDP from 26.2 per cent in 1989 to an estimated 5.7 per cent in 1990. In Ethiopia, the civil war led to a budget deficit of 24.1

per cent of GDP in 1989. In the 1990 estimates, the deficit was reduced to 17.5 per cent but the actual deficit was probably higher, since the pre-June 1991 Government set the deficit ratio in the 1991 estimates at 23.4 per cent.

Nevertheless, the progress made by many Governments has been impressive: in Zimbabwe, the deficit ratio fell from more than 20 per cent at the beginning of the 1980s to 3.6 per cent in 1990; and in Egypt, where the financing of huge consumer subsidies and the policy of guaranteed recruitment of graduates into the civil service had kept the ratio above 20 per cent, the 1990 estimates showed a ratio of 7.2 per cent and a further decline was planned for 1991.

Oil-exporting countries had an easier task than the other countries of the region but, given their larger borrowing capacity, they were able on the whole to sustain higher deficit ratios. Both groupings, however, showed the same trend: the deficit ratio declined to around 6 per cent in 1990. The financing of the deficit is difficult to interpret because most available data refer to the estimates rather to actual outcomes. However, the share of external financing seems to have fluctuated around 40 per cent. As to domestic financing, it is important to note the practice of many Governments of building up arrears on current domestic payments, creating in effect a kind of "forced" internal debt. Such arrears were sometimes considerable and starved the private sector of liquidity. In the CFA countries, where Governments cannot borrow from the banks more than a fixed percentage of current receivables, those arrears played a particularly important role in the financing of government deficits. In Côte d'Ivoire, the arrears of domestic payments amounted at the end of 1989 to CFA 425 billion, equivalent to \$1.6 billion.

B. Monetary Developments

Expressed in dollars terms at current exchange rates, regional money supply M1, defined as currency outside banks plus net demand deposits, increased by 14.6 per cent in 1990. The volume of money M2, (defined as money plus quasi-money), increased by 15.1 per cent. The annual growth rates of those and other monetary indicators in 1988-1990 are shown in table VI.3 below.

Table VI.3
Annual growth of monetary indicators in developing Africa, 1988 - 1990*
(Percentage)

	1988	1989	1990
Net foreign assets	-3.7	10.6	4.6
Domestic credit	2.3	-6.3	8.6
of which:			
Public sector	13.4	-3.7	10.4
Private sector	-6.9	-14.4	3.1
Money supply (M1)	-1.7	-12.0	14.6
Quasi money	11.5	-10.4	4.1
Volume of money (M2)	-4.6	23.6	15.1
Other items	2.2	-11.2	-7.2

Source: ECA Secretariat calculations based on International Financial Statistics, and country reports.

* Averages weighted by GDP at current exchange rates.

While the aggregate increase in liquidity in 1990 was due to domestic credit expansion, the impetus for monetary growth differed as between oil-exporting and non-oil exporting countries. In the former case, it was mainly due to an increase in foreign assets. In the latter case, it was due to increased domestic credit — foreign assets declined on account of lower export prices and higher import prices. The increase in the foreign assets of the oil exporters was less than the decrease in the net foreign assets of the non-oil exporters, so that for the region as a whole the foreign asset position worsened.

The policy of monetary restraint pursued by Governments of oil-exporting countries had the effect of sterilizing the potential for liquidity growth of their higher net foreign assets; and in the case of the non-oil exporters domestic credit was expanded to make up for lower government expenditure.

Nevertheless, the slowing of the expansion of liquidity in the region was a remarkable testimony that the lesson from past experience had been learned: that unrestrained monetary expansion is more harmful than beneficial to social welfare. It is true that, as shown in table VI.4 below, the growth of money supply accelerated in 1990: growth was 10 per cent or more in 20 countries, compared to 17 countries in 1989.

However, overall, the acceleration may be considered moderate, in that the number of countries where growth exceeded 30 per cent was the same in both years and was less than in recent preceding years.

Table VI.4
Frequency distribution of selected countries according to percentage growth rates of money supply, 1987-1990

	1987	1988	1989	1990
Negative	8	7	6	6
0-5	6	6	6	5
5-10	6	6	6	5
10-20	4	5	4	6
20-30	3	3	5	6
30 and over	9	10	8	8
Number of countries surveyed	36	37	37	36

Source: ECA Secretariat calculations based on data in International Financial Statistics, vol. XLIV, No. 2, (February 1991); and country reports.

At subregional level, the largest percentage increase in liquidity in 1990 was recorded in Central Africa (21) and the smallest in North Africa (6.3). West Africa averaged 15.8, and East and southern Africa 13.1. In each of the subregions, moderate increases in most countries were overshadowed by exceptionally large increases in one or two countries: Zaire's 64 per cent in Central Africa; Sierra Leone's 73 per cent and Ghana's 42 per cent in West Africa; and Uganda's 69 per cent in East Africa.

Among the countries with negative growth rates were Algeria, Côte d'Ivoire, Malawi and Togo. At the other extreme, the growth in liquidity exceeded 30 per cent in 1990 in Madagascar, Nigeria, Sierra Leone, Somalia, the Sudan, Uganda, Zaire and Zambia

C. Consumer Price Developments

Consumer prices in the countries of developing Africa continued their upward trend in 1990, albeit at a much slower pace than in the previous year: inflation averaged 15.4 per cent compared to 20.2 per cent of 1989. Table VI.5 below shows the annual price increases by subregion in 1987-1990.

North Africa maintained its position as by far the least inflationary subregion. The higher oil revenues in 1990 made it possible to increase considerably the supply of goods in Algeria and the Libyan Arab Jamahiriya,

Table VI.5
Consumer price trends in developing Africa by subregion, 1987 - 1990
(Annual percentage increase)

	1987	1988	1989	1990
North Africa	6.4	8.4	8.2	6.6
West Africa	10.8	27.7	34.0	23.2
Central Africa	24.4	20.0	15.6	18.6
East and Southern Africa	31.4	33.1	24.0	15.2
Developing Africa	12.9	20.1	20.9	15.4

Source: IMF, International Financial Statistics, vol. XLIV, No. 2 (February 1991); and country reports.¹

easing pressure on prices. That favourable factor was reinforced by the policy of hard money which most Governments of the subregion adopted, thereby significantly slowing the rate of price increases.

The West African subregion recorded the highest rate of inflation. While the rate moderated in Nigeria during 1990, the other countries of the subregion were not as fortunate. Sierra Leone suffered the highest rate, with prices more than doubling, while in Ghana the inflation rate jumped by as much as a third.

In Central Africa, the subregion with the second highest rate of inflation, the outcome in 1990 was greatly affected by developments in Zaire: a rate of 81 per cent, following on 104 per cent in the previous year. In Cameroon the rate in 1990 was a modest 5 per cent.

The subregion of East and southern Africa managed to decrease its rate of inflation to about 15 per cent, despite the heavy pressure resulting from higher import prices, particularly oil prices. The improvement was brought about by success in restraining demand and by the operation of subsidies. As a result, the rate was low in practically all countries of the subregion. The exceptions, with very high rates, were the United Republic of Tanzania and Zambia.

PART II : MAIN ECONOMIC SECTORS

VII. AGRICULTURE, FISHING AND FORESTRY

A. Overview of the Sector

According to data provided by FAO, the annual growth of output of agriculture (including livestock, fishing and forestry) in developing Africa was 1.5 per cent in 1990 compared to 0.5 per cent in 1989. Noticeable gains were recorded in the North and Central African subregions, where the growth percentages were 5.2 and 3.2, respectively. (In this chapter of the Survey, the ECA classification of countries into subregions is modified by the addition of a Great Lakes subregion, created by the transfer from "Central Africa" of Burundi, Rwanda and Zaire.) In West Africa, East and Southern Africa, and in the Great Lakes region, the results were much less favourable and the reported percentage annual growth in output was -0.1, zero and 0.9, respectively.

Table VII.1
Growth rates of agricultural production in developing Africa by subregion, 1987 - 1990

	1987	1988	1989	1990
North Africa	0.3	0.8	-2.1	5.2
West Africa	-4.4	..	1.8	-0.1
Central Africa	-1.3	7.8	-3.4	3.2
Great Lakes	2.0	0.8	-2.1	0.9
East and Southern Africa	-1.2	4.7	2.6	0.0
Developing Africa	-1.5	4.0	0.5	1.5

Source: FAO, Computer printouts (Rome, December 1990).

With food production in many developing African countries either stagnating or increasing at rates below population growth, the 1990/1991 estimated food import requirement for the region rose to 17 million tons. Of that total, food aid accounted for 4.5 million tons, leaving a balance of 12.5 million tons to be met by commercial imports.

The North African subregion has the highest import dependence: 1 kg in 3 kg of food consumed has to be imported. In sub-Saharan Africa, the import dependence averages 1 kg in 7 kg consumed. In 1989, according to the World Bank¹, the share of food

imports in total merchandise imports reached 17.5 per cent in sub-Saharan Africa and 20.9 per cent in the North African subregion. The share was particularly high in Algeria, Angola, Egypt, Mauritania, Mozambique, Senegal, Somalia, the Sudan and Togo. In the second half of the 1980s, sub-Saharan African has been the world's largest recipient of food aid, accounting for 39 per cent of total such aid and representing 26.4 per cent of world food imports, or 3.6 per cent of world merchandise imports².

The ability of developing African countries to import food depends on their export earnings and on food aid. Unfortunately, export earnings from sales of traditional commodities have been far from encouraging, since over-supply and weak demand continue to prevail in the affected markets. With the exception of tobacco and cotton, the prices of those agricultural commodities which are of particular interest to the economies of African developing countries registered a marked deterioration in both 1990 and 1991. Some basic structural bottlenecks exist: protectionism continues to affect export earnings and a significant lowering of trade barriers in the industrialized countries is not in sight. The international commodity agreements which entered into force in the 1970s and 1980s are being dismantled. The Uruguay Round of GATT negotiations, which are partly aimed at far-reaching reforms in world agricultural policies and trade, including greater access to the markets of the developed economies for tropical products, has not been concluded yet. What is more, debt-service requirements compete with food imports for scarce foreign exchange, leaving little room for vital imports of agricultural inputs and investment goods.

B. Trends in Food Production

Aggregate cereal output in developing Africa in 1990 was 76.9 million tons³, about 3.8 per cent less than in 1989 and 5.1 per cent below the bumper harvest of 81 million tons in 1988. The harvest of roots and tubers, which traditionally provides a key element of

1 World Bank, World Bank Development Report, 1991 (Washington DC, 1991).

2 FAO, Committee on World Food Security, Sixteenth Session, 11-15 March 1991 (CFS: 91/3, January 1991)

3 Food Outlook, NOI (FAO, Rome, May 1991). [What is "NOI"?]

food supply in much of tropical Africa, stood slightly above 100 million tons in 1990, compared to about 101 million tons in both 1988 and 1989. Cassava production was estimated at 72.7 million ton in 1990, 1.8 per cent more than in 1989, in which year it had grown by a considerable 10.5 per cent. Production of pulses, however — a basic protein source in much of developing Africa — has stagnated: the estimated tonnage for 1990 was 6,654,000 compared to 6,701,000 in 1989.

The food supply situation shows significant variations among the subregions. In Northern Africa, Egypt achieved a record wheat crop in 1990 estimated at 4.2 million tons. In contrast, the nine countries in Western Africa of the Permanent Inter-State Committee on Drought Control in the Sahel (CILSS), saw their output of cereals decline in that year to some 7.5 million tons — about 6 per cent less than in the previous (above-average) year, but also 15 per cent below the record of 1988 and 3 per cent below the average of the past five years. In other parts of the West African subregion, including Benin, Ghana, Nigeria and Togo, cereal output suffered from insufficient rainfall. In Chad and the Niger, cereal production was substantially below normal for the second year in succession. Food shortages have become increasingly serious in Liberia, where continuing civil strife has impeded the marketing and distribution of food. In Sierra Leone, the food situation remains tight because of the large numbers of refugees from Liberia.

In Eastern Africa, the aggregate output of coarse grains was estimated at 16 million tons, about 9 per cent lower than in 1989, mainly reflecting reduced output in Kenya and the United Republic of Tanzania. In Ethiopia, although aggregate output of cereals was estimated to be some 6.7 per cent higher in 1990 than in 1989, the harvest outlook was extremely poor in large parts of Tigray and in Hararghe. With food stocks at low levels and serious logistic constraints arising from the civil war, the current serious food emergency is expected to continue throughout 1991. In the Sudan, a cereal harvest of only 2.1 million tons was forecast for 1990/1991 — less than half the level of the previous crop year. With stocks virtually exhausted following the poor harvest of the preceding year, imports of some 1.2 million tons will be required during 1991, of which only a small part can be acquired commercially.

In Southern Africa, the subregional coarse grain harvest in 1990 fell to 16.6 million tons, some 17 per

cent less than in 1989. In Angola, civil disturbances, shortages of imports and deficient rainfall in some coastal areas continue to affect farming activities. In Mozambique, the food supply situation remains precarious as a result of late arrivals of pledged food aid and lack of transport facilities for its internal distribution.

In Central Africa, overall prospects of coarse grain production are favourable: good harvests are expected in the Central African Republic, the Congo, Gabon and Zaire. However, roots and tubers are the staple food and in that respect conditions appear to have been normal or rather better [Words added.] : in Zaire, for example, cassava production increased in 1990 to 17 million tons or 3.7 per cent more than in 1989.

An interesting aspect of the food supply situation in 1990 was the greater number of countries which held surplus food for export. In Eastern Africa, for example, a substantial surplus (some 260,000 tons) of maize was available in Kenya. In West Africa, six countries held exportable surpluses of cereals totalling 466,000 tons: 60 per cent was held by Mali, a land-locked country, and smaller quantities were held by Benin (30,000 tons), Ghana (43,000 tons), Togo (41,000 tons) and Burkina Faso (50,000 tons). In Southern Africa, Zimbabwe held 357,000 tons for export. Those quantities need to be compared with cereal import requirements for developing Africa which, as indicated earlier, are forecast to reach 17.0 million tons for 1990/1991.

C. Production of Industrial Crops

The output of industrial crops in developing Africa in 1987-1990 and the regional share in world production are shown in table VII.2 below. In 1989 and 1990, regional production of cocoa, coffee and seed cotton was stagnant or even in decline. For all other products shown, with the exception of sugar, output rose strongly. The regional position on the world markets has not otherwise undergone significant changes. The most disquieting feature concerning industrial crop markets during those years, however, was the almost continuous fall in the prices of most primary commodities exported — in particular, cocoa and coffee — which was so severe that there has been in some cases a shift by farmers to the production of food crops.

Table VII.2
Production of industrial crops, 1987 - 1990

	1987	1988	1989	1990
Thousand tons				
Cocoa				
Cameroon	133	124	120	109
Cote d'Ivoire	664	823	820	720
Ghana	184	289	295	300
Nigeria	150	160	160	170
Developing Africa	1182	1452	1328	1370
World Total	2082	2461	2449	2429
Coffee				
Cameroon	96	138	84	100
Cote d'Ivoire	270	182	239	220
Ethiopia	186	170	200	195
Kenya	105	125	104	96
Developing Africa	1260	1212	1244	1221
World Total	6451	5684	6021	6040
Tea				
Kenya	156	164	181	190
Malawi	32	40	40	40
United Republic of Tanzania	14	16	16	18
Zimbabwe	15	17	18	18
Developing Africa	255	273	291	306
World Total	2419	2483	2477	2523
Seed Cotton				
Burkina Faso	175	179	179	200
Cote d'Ivoire	214	256	291	240
Egypt	981	882	821	900
Mali	259	228	290	245
Sudan	546	514	408	420
United Republic of Tanzania	189	253	250	175
Zimbabwe	256	341	273	230
Developing Africa	3678	3853	3727	3621
World total	48800	53470	49081	52900
Sugar				
Egypt	992	1011	945	957
Mauritius	644	634	572	680
Sudan	522	441	385	421
Swaziland	461	465	504	500
Zimbabwe	454	453	502	497
Developing Africa	5751	5851	5669	5965
World Total	101013	102950	105758	109773
Tobacco				
Malawi	73	75	86	91
United Republic of Tanzania	13	15	15	15
Zimbabwe	131	124	130	142

Developing Africa	301	300	321	343
World total	6167	6754	7137	6958
Percentage share of region in world				
Cocoa	56.77	59.00	54.23	56.40
Coffee	19.53	21.32	20.66	20.22
Tea	10.54	10.99	11.75	12.13
Seed cotton	7.54	7.21	7.59	6.84
Sugar	5.69	5.68	5.36	5.43
Tobacco	4.88	4.44	4.50	4.93
Source: FAO, Production computer printouts (Rome, December 1990)				

1. Seed cotton

Production of seed cotton in developing Africa was estimated to have declined by 2.8 per cent in 1990 to 3.6 million tons, which compared to 3.7 million tons in 1989. In Egypt, which is the largest producer, output reached an estimated 900,000 tons, compared to 821,000 tons in 1989. Cotton is the most subsidized commodity in Egypt. Its producers are eligible for low-interest loans, free preparation of seed beds and subsidized seed and pesticides. Despite such inducements, however, artificially low producer prices have steadily led farmers to switch acreage from cotton to more remunerative crops. In fact, they were getting a return in 1989 of only 35 per cent of the world price. In 1990, however, conditions improved remarkably because better producer prices were granted. In Côte d'Ivoire, cotton production has increased remarkably over the decades, from a trifling 7,000 tons in 1959/1960 to 142,975 tons in 1979/1980 and to 291,000 tons in 1988/1989. Consequently, it has emerged as the third largest producer in the region. However, its exports (about 80 per cent of production) have suffered from the competition of Asian producers.

It was anticipated that there would be a significant shortfall of world production in relation to consumption in 1990; and that, as a result, cotton stocks could plummet further and result in the lowest ratio of stock to annual usage since 1980/1981 — slightly above 30 per cent. That expectation was reflected in the trend of cotton prices: the Liverpool price index, which had fallen in 1988, rose to 126.7 (base 1985 = 100) in 1989 and to 134.6 in 1990 — a further gain of 6.2 per cent. Egyptian cotton prices (Egypt, Giza 45, c.i.f. Northern Europe), which had stood at 289.35 cents per lb in 1989, rose to 299.73 cents per lb in 1990, an increase of 3.6 per cent.

2. Sugar

Production of sugar in developing Africa was estimated to have increased from 5.7 million tons in 1989 to 6

million tons in 1990, or by 5.2 per cent — well above the world average of 3.8 per cent. In Mauritius, good weather and higher extraction rates were expected to push production to 650,000 tons in 1990, with foreign exchange earnings estimated at \$340 million in that year. In Zimbabwe, 140,000 tons of sugar were expected to be available in 1990 for export and to earn Z\$97 million (\$40 million). In Swaziland, the volume of sugar exports rose by some 5 per cent in 1989/1990 — 418,929 tons compared to 399,024 tons in 1988/1989. The f.o.b. value of sugar exports increased by about 27 per cent to 393.2 million Emlangani in 1989/1990 compared to E 309.4 million received in 1988/1989, by reason of the relatively buoyant international price and a favourable exchange rate for the Lilangeni.

In 1990, the international price of sugar peaked at 16.1 cents per lb in March. It then declined steadily, due to higher-than-expected output in Cuba, India and the USSR; to lack of demand in importing countries; and to the prospect of a record world sugar output in 1990/1991. Despite that trend, the import price set by EEC — the one that matters for countries such as Mauritius, which enjoy an import quota in the EEC market — was raised by 16.2 per cent to \$165.7 per lb.

3. Tobacco

Production of tobacco in developing Africa increased by 6 per cent in 1990 to 343,000 tons, compared to 321,000 tons in 1989. In Zimbabwe, which produces a third of the total, average prices for flue-cured leaf surged by 50 per cent to nearly Z\$6.5 (\$2.60) per kg in 1990. And when the Harare auction sales ended in October 1990, a total of 133 million kg of leaf had been sold for nearly Z\$860 million, 50 per cent more than in 1989. In view of excellent crop quality, strong world demand and the low volume of sales offered by Brazil (Zimbabwe's main international competitor), both growers and traders expected higher prices in 1991, with exports forecast to rise to Z\$1 billion. In Malawi, tobacco production was estimated at 91,000 tons in 1990 compared to 86,000 tons in 1989, with

export earnings estimated at \$42 million.

International trade in tobacco was expected to remain firm in 1991, though some anxiety was felt over the impact of the Gulf Crisis on Middle East sales. Moreover, the transition to market-type economies in Eastern Europe has undermined the barter business, which had become an increasingly divisive issue in the industry: some exporters were convinced that Zimbabwe was selling itself short by agreeing to barter tobacco with buyers in Eastern Europe and the Middle East.

D. Livestock

In 1990, the livestock population (cattle, buffaloes, sheep, goats, pigs and horses) of developing Africa was estimated at about 233 million tropical livestock units (TLU)⁴. Table VII.3 below, which shows population and several other performance indicators for livestock, contains data for 1980 and estimates for 1990 by subregion. Over the period 1980-1989, the African livestock population grew at an annual average rate of less than 1 per cent.

The total asset value of livestock (as defined above) was estimated at \$58.2 billion in 1990, which represented an increase of 110 per cent over 1980. In 1990, the estimated contribution of the livestock sector to farm incomes was \$5.6 billion and to farm wealth was \$558.4 million. Although rinderpest was nearly under control, the avoidable losses were still high (\$4.7 billion) per annum, mainly because earlier progress in disease control and water development has been reversed.

Leaving aside cattle and pigs, it is noteworthy that over the last decade, in the case of buffaloes, chickens and horses the average carcass weight of slaughtered animals declined and that in the case of sheep and goats it remained constant. Hence the annual increase in meat production, which averaged 2.1 per cent, was due essentially to the slaughter of a growing number of animals.

4 One TLU is equivalent to 250 kg live weight. Cattle, buffaloes and horses are treated as equivalent to 1 TLU; each sheep and goat represents 0.1 TLU; and each pig is counted as 0.2 TLU.

Table VII.3
Livestock performance indicators by African subregion, 1980 and estimates for 1990

	Livestock Population ('000 TLU*)		Meat Production ('000 Mt)		Meat net import ('000 mt)		Meat consumption				SSR in meat (%)	
	1980	1990	1980	1990	1980	1990	('000 mt)		kg/head		1980	1990
							1980	1990	1980	1990		
North Africa	44624	47365	1439	1828	345	517.6	1784.0	2345.6	16.6	16.3	80.7	77.9
West Africa	44698	46683	1253	1654	84.4	102.6	1337.4	1756.6	9.3	9.1	93.7	94.2
Central Africa I	11891	13925	202	287	19.9	75.6	221.9	362.6	12.2	14.8	91.0	79.2
Central Africa II	3124	3295	107	126	11.7	45.9	118.7	171.9	3.3	3.6	90.1	73.3
East and Southern Africa	106688	121395	1719	2032	7.5	48.6	1711.5	2060.6	11.8	10.7	100.4	97.7
Region	211025	232663	4720	5927	-453.5	-790.2	5173.5	6717.2	11.5	10.7	91.2	88.2

Source: ECA Secretariat, based on FAO Production computer printouts, April 1990

* See foot note 4 to text above

Regional meat production in 1990 was estimated at 5.9 million tons compared to 4.7 million tons in 1980. Presumably Per capita consumption declined from 11.5 kg in 1980 to an estimated 10.7 kg in 1990, reflecting the serious deterioration of living standards during the 1980s. The meat self-sufficiency ratio was estimated to have dropped from 91.2 per cent in 1980 to 88.2 per cent in 1990.

The deterioration in the SSR was exacerbated by distortions in the trade policies of the major world economic groupings and by the dumping of subsidized frozen meat by EEC, even in African developing countries that produce livestock. Hence, meat imports increased annually by 4.2 per cent on average during the last decade, despite the potential for collective self-sufficiency at a higher level of per capita meat consumption.

In monetary terms, regional imports (of livestock products) have increased over the decade 1980-1990 by 3 per cent per annum, while export revenues have decreased by 4.1 per cent per annum.

The livestock trade deficit thus grew to \$2.5 billion in 1990 compared with \$1.7 billion in 1980. Most of the deficit (65.5 per cent in 1990) came from the North African subregion, as shown in table VII.4 below. There have been substantial changes in the trade position of the various subregions, due to divergent rates in the growth in their meat production and consumption. In Central Africa, for example, while consumption has grown annually by an average of 5.4 per cent in 1980-90 — more than twice the regional 2.6 per cent — production has grown by 3.5 per cent.

E. Forestry

1. Forest Cover

Africa's forest cover has continued to shrink and an estimated 8 million hectares of closed forests and open woodlands has been lost during the last biennium. That represented about 2,000 million cubic metres of timber. Deforestation at that rate has obvious consequences for environmental conditions in Africa

Table VII.4
External trade in livestock products by African subregion: 1980 and estimates for 1990

	Imports		Exports		Trade balance			
	1980	1990	1980	1990	1980	1990	1980	1990
	Million dollars				Percentage of total			
North Africa	866.4	1736.5	10.1	5.9	-856.3	-173.0	49.7	70.2
West Africa	618.1	292.8	2.9	0.1	-615.3	-292.7	36.7	11.9
Central Africa	82.1	144.9	3.7	0.1	-78.4	-144.8	4.5	5.9
Great Lakes	46.4	77.7	0.0	0.1	-46.4	-77.8	2.7	3.2
East and Southern Africa	231.6	289.9	106.0	71.5	-125.6	-218.4	7.3	8.9
All Africa	1844.8	2542.0	122.8	77.7	-1722.0	-2464.3	100.0	100.0

Source: ECA Secretariat, based on FAO Production computer printouts, April 1990

and its rural communities are particularly affected. For example, deforestation has partly been the cause of the floods that occurred in Gambela Province of Ethiopia in September 1990. In Uganda, heavy deforestation is thought to be the cause of the seasonal changes which are affecting the Karamoja region.

In North Africa, due to their constant exploitation, open and closed forests are now only a relic of what they were in earlier times. Even if the Sudan is included, those forests now represent less than 6 per cent of the subregion's land area and in some countries of the subregion, such as the Libyan Arab Jamahiriya and Egypt, there are no forests left to speak of. Recent studies indicate that at least three West African countries, namely, Côte d'Ivoire, Nigeria, and Senegal, will lose their productive closed forests within the next decade unless urgent and realistic measures to prevent deforestation are promptly taken. In countries like Cameroon, Equatorial Guinea, Gabon and Zaire, the dense tropical forests are not threatened to such an extent, basically because population pressure is still low. The practice of shifting cultivation, which requires large areas to lie fallow, is not by itself destructive of the forest areas at low levels of population pressure, but with population growth agricultural practices will have to change if the forest cover is to be preserved.

Table VII.5 below gives estimates of the standing timber volume up to the year 2000 in the closed productive forests in selected African countries.

Table VII.5 Estimated growing stock in closed productive forests of selected African countries, 1980 - 2000 (Million cubic metres)				
	1980	1990	2000	Decrease 1980-2000
Angola	270	222	173	97
Cameroon	4645	4434	4223	422
Central African Republic	1102	1086	1070	32
Cote d'Ivoire	766	99	..	766
Ghana	198	165	132	66
Guinea Bissau	25	16	8	17
Liberia	220	145	70	150
Nigeria	492	44	..	2
Senegal	2	..	..	2
Total	7820	8211	5776	2044
Source: FAO, Outlook for the Forestry Section in Africa (Rome, 1984)				

The open formations mainly known as savannah, which occupy about 467 million hectares (ha), have also suffered significant losses: an annual depletion rate estimated at 2.4 million ha. The "miombo woodland", which has lost 0.5 million ha out of 200 million ha during the last two years is the most affected ecosystem. Their rehabilitation is therefore an urgent need. The acacia trees in the open formations of the Sahel are likewise being destroyed, mainly through cutting fuelwood, harvesting, over-grazing and clearing for agricultural purposes.

2. Forest Management and Utilization

The contribution of the forestry subsector to GDP has been estimated at \$12 billion in 1987, a sum which, however, does not include the value of non-wood products such as wood-based energy, beeswax, tannin and gum arabic, as well as wildlife and other products largely utilized by rural communities. The value of honey and beeswax exported by the United Republic of Tanzania (\$800,000 in 1988), and of the related domestic consumption (6,000 tons in the same year) illustrate the importance of such excluded items. The potential annual production of honey in that country is estimated to be 130,000 metric tons. Myrrh, gum arabic and oppomex are important sources of income in Chad, Ethiopia, Somalia and the Sudan, among other countries. Ethiopia produces in addition about 2,000 tons of incense a year, but this is below the potential for mainly technical reasons. In Kenya, despite the massive use of synthetic products for curing leather, there are traditional tanning substances extracted from the wattle tree. In Somalia, the nuts of the Cordeauxia edulis (yicib) are a foodstuff, while its leaves are utilized as fodder in the dry season. Those forestry products contributed largely to the economy of developing Africa in 1990. Nevertheless, their impact would have been more significant if forests were sustainably exploited and conserved under detailed management plans. Unfortunately, only a few countries, such as Ghana, Kenya, Morocco, Tunisia and Uganda, have developed such plans. In all, only about 2 per cent of the region's productive closed forests are under management plans for the rational development of their timber products.

3. Production and Consumption of Timber

Regional production of industrial roundwood, in cubic metres, was around 46 million in 1990. In 1988, the total had been 43.8; Nigeria was the main producer, with almost 8 million, followed by Côte d'Ivoire with 3.4 million. Consumption amounted to 0.07 cubic metres per capita in 1988, the same as in 1986. The evolution of the production and apparent consumption of industrial roundwood is depicted in the table VII.6 below.

Table VII.6 Production and consumption of industrial roundwood in developing Africa, 1980-1988 (Million cubic metres)			
	1980	1985	1988
Production	39.27	41.67	43.76
Imports	0.74	0.99	1.19
Exports	6.14	4.49	4.51
Apparent consumption	38.89	38.17	40.44
Source: FAO, Yearbook of Forest Products, 1988; and calculation			

The table shows that, while production grew at an annual rate of 1.36 per cent, exports decreased by 3.9 per cent annually during the period 1980-1988. Imports, in contrast, increased by an annual 6.1 per cent, or 0.45 million cubic metres, to meet the internal local and industrial demand.

In general, exports of sawn logs have been held almost constant due to the growing internal demand in most countries and also to the fact that some European countries are limiting the import of such tropical products to prevent depletion and degradation (over-exploitation) of tropical forests. Another factor is the intense competition from Asian timber products, both in quality and price, in the European markets. The volume of exports of sawn logs to European countries will therefore probably continue to decline during the next decade and perhaps beyond the year 2000. Table VII.7 below shows corresponding data to table VII.4 in respect of sawnwood and sleepers.

Table VII.7 Production and consumption of sawnwood and sleepers in developing Africa, 1980-1988 (Million cubic metres)			
	1980	1985	1988
Production	6.1	6.4	6.9
Imports	2.3	4.3	3.1
Exports	0.83	0.87	0.91
Apparent consumption	7.57	9.83	9.09
Source: FAO, Yearbook of Forest Products, 1988; and calculation			

The region still greatly depends on imports of paper and paperboard, which in 1988 reached 1.7 million tons, while production totalled only 0.8 million tons and exports were practically nil. The domestic industries should be promoted and revitalized. Though present per capita consumption is very low, demand will be difficult to meet with over one billion inhabitants

by the year 2000, unless regional production capacity is proportionally increased.

4. Production of Wood Energy and Charcoal

According to official estimates, forests contributed over 368 million cubic metres in 1988 to energy supplies and charcoal over 9 million during the same period. The value of those kinds of energy, if costed in oil equivalent at \$25 a barrel, represented a saving of foreign exchange of about \$14 billion or 589 million barrels of oil in 1988. That calculation illustrates clearly the importance of the forestry sector as a source of energy in developing Africa. However, firewood harvesting is a main factor of deforestation in the region (2 million ha are being cleared each year), while poor utilization of the forest bio-mass, the unsuitable location of many plantations and the insufficient diffusion of know-how about energy saving have aggravated the problem. (Firewood as a source of energy is also the subject of observations in chapter VI below.)

New policies are needed to help farmers to be self-sufficient, through the plantation of appropriate trees for fuel, and to improve the efficiency of the combustion systems employed. Furthermore, the design and practical adoption of a new model of management that integrated the uses of both wood and non-wood resources, as well as giving special attention to the production of energy from wood, could help meet the firewood requirements of developing Africa by the next decade.

5. Afforestation and Reforestation

Both afforestation and reforestation continued to be carried out in 1989 and 1990 at an estimated rate of 250,000 ha per annum. With few exceptions, African countries have acquired considerable experience of afforestation techniques, particularly those required in arid and semi-arid areas. For example, it is estimated that in Algeria over 200,000 ha. of trees have been planted in the "green belt" that became operational in 1971. In the Libyan Arab Jamahiriya, Morocco and Tunisia, green belts have been established to protect cities, roads, oases and communications networks from the encroachment of the desert. In general, the Northern African countries have done more in planting trees in dry zones than other subregions. Thus, over 1.9 million ha had been planted in the subregion by the end of 1988. Estimates of annual rates of plantation and of the area planted at the end of 1988 are given in table VII.8 below.

Table VII.8
Estimates of forest plantation in selected African countries, 1988

	Hectares planted in year	Percentage of regional total	Hectares under plantation at year end	Percentage of regional total
Algeria	35000	14.0	325000	7.0
Burkina Faso	1000	0.7	32354	0.7
Ethiopia	15000	6.0	250000	5.5
Niger	13000	5.2	42195	0.9
Senegal a/	8500	3.4	135681	3.0
Sudan	10000	4.0	268000	5.9
Subtotal	83300	33.3	1053230	23.2
Region	250000	100.0	4500000	100.0

Although 250,000 hectares planted each year may seem a modest amount — only 6.5 per cent, on average, of the forest cover lost each year — the financial implications need to be considered. Assuming a minimum cost of \$800 per hectare of plantation, the afforestation budget of developing Africa might have to reach \$200 million a year. Nevertheless, the effort involved in planting and tending trees must continue, at least to the extent required to restore the forest cover annually depleted for wood energy purposes, which is estimated at over 2 million ha. That undertaking would require, in addition to financial resources, the availability of skilled manpower and appropriate technical assistance. The annual budget to reforest the area cut for wood energy might well be almost \$1,600 million for the region.

F. Fisheries

The fishery subsector plays an important role in the national economy of most African countries, not only as a major source of foreign exchange but also by generating employment for a significant part of their population, apart from the contribution which it makes to food resources. There are about 700,000 inland water fishermen in developing Africa, while another 3.5 million earn their livelihood through fish processing and distribution activities. Furthermore, fish provides much of the animal protein requirements for the majority of the population of the region. The subsector is therefore a major concern of national planners in order to promote food self-sufficiency and to improve the nutritional status of the population.

The fish production potential of the region is estimated at about 8 million tons per annum, of which 4.6 million tons would come from marine and 3.3 million tons from inland water resources. The areas with the greatest marine potential are the South-East Atlantic zone and the northern zone of the East-Centre Atlantic, extending from Morocco to Liberia. The leading marine fish-producing countries in the region include Ghana, Mauritania, Morocco and Senegal. Inland fishery sources are the largest on any continent and the major producers are Egypt, Uganda, the United Republic of Tanzania and Zaire. Tilapia and freshwater catfish are two of the important species harvested in the region.

Aquaculture production in Africa is of minor importance. Production was estimated at less than 17,000 tons in 1985, Nigeria, Zambia and Zimbabwe being the main producers.

Total fish production from all regional waters, marine and continental, reached about 5.3 million tons in 1988, showing an increase of 29 per cent over the 1985 catch, but a slight fall of 1.7 per cent compared to 1987, inland fisheries accounting for 30 per cent of the total catch.

Despite the abundance of fishery resources in the region, per capita fish consumption has been quite low: about 8.1 kg per annum in live weight equivalent (1984-1986 average). The variations among countries are considerable and reflect the distribution of fish resources: for example, Burkina Faso, 0.8 kg; the Niger (a land-locked Sahelian country), 0.5 kg; Senegal, 24.9 kg; Ghana, 22.7 kg; the Congo, 44.7 kg; and Seychelles, 52 kg. Although Morocco is one of the leading fish-producing countries in the region, its fish consumption was one of the lowest (8.4 kg).

Fishing activity is mainly export-oriented in developing Africa. Priority has been given to catching high-value species rather than other species which could increase the domestic supply of fish. The output from fisheries has tended to decline or stagnate.

In value terms, the region has become a net exporter of fishery products: in 1988, exports worth \$1.5 billion compared to imports of \$878 million. The exports had increased annually by 17 per cent in 1987 and 10 per cent in 1988. In quantity terms, however, the region remains a net importer and most countries still depend heavily on imports for their fish consumption.

It is necessary to consider the seven FAO fishery commodity groups⁵. For fish — whether fresh and frozen/chilled or dried/salted/smoked (the first two groups) — the region is a net importer, both in terms of quantity and value. For instance, the value of imports in 1988 of the first kind of products was \$626 million, an increase of 11 per cent compared to 1987, despite a reduction of 7 per cent in quantity to 968,432 tons. The traditional major importing countries and the tonnage that they imported in 1988 were: Nigeria (256,470 tons) and Ivory Coast (210,574 tons). Fish imports were also important, however, in Angola, Algeria, Cameroon, the Congo, Egypt, Gabon and Liberia.

The African region is a net exporter, both in terms of value and quantity, of fish (both groups); of crustaceans and molluscs; and of fish products and preparations, whether or not in airtight containers. Though production seems to have stagnated, exports have grown rapidly during recent years, more particularly in terms of value. Indeed, the value of the exports in 1988 of crustaceans and molluscs, \$788 million, was 13 per cent more than in 1987, whereas production was about 175,000 tons in both those years. The value of exports of fish preparations and products increased by a smaller sum in 1988 but, at 14 per cent and in association with an increase in quantity of 10 per cent, was not negligible. Côte d'Ivoire, Mauritania and Morocco are usually the main producers and exporters of the latter group of products. Those countries will need to modernize their processing industry if they are to produce and export products with higher value added, such as crustaceans and mollusc products and preparations.

Regional trade in oils and fats and in meals etc., of aquatic animal origin (the last two FAO groups), remained insignificant compared to international production of, and trade in, those commodities. Imports are generally of relatively low-priced products, mainly pelagic species. Exports consist of relatively high-value species such as tuna, shrimps, cephalopods and demersal fish. North Africa (Algeria, Morocco and Tunisia) accounted for 35 per cent (\$519 million) and West Africa for 43 per cent (\$627 million) of the value of those exports in 1988.

Poor infrastructure and managerial capacity, coupled with a lack of technology and financial resources, have been the main obstacles to the development of the fishing industry in developing Africa. At the same time,

substantial volumes of fish are wasted through spoilage. Other adverse factors include competition in the coastal fishing grounds between foreign industrial vessels and domestic artisanal fleets, and the slow development of agriculture.

African Governments are fully aware of the importance of the fishery sector but the lack of finance and of knowledge — in both marine sciences and technologies — has impeded the effective exploitation of their fish wealth. The need for greater regional economic co-operation among African countries is therefore paramount in this sector. The potential for economic co-operation in the subregions of the Great Lakes, the Lake Chad basin and the North African countries is very large indeed.

G. Agricultural Policies in Developing Africa

Structural changes are still taking place in the agricultural sector. In most countries, the changes are directed towards a further liberalization.

1. At the country level

The measures taken in 1989-1990 by the Government of Ethiopia under the "New Economic Policy" are a striking example. The "villagization" programme initiated in 1985/1986 was practically halted, farmers were allowed to sell their produce on the free market instead of to the Grain Marketing Corporation, which had exercised a trade monopoly, private merchants being allowed to buy grain from the farmers. The Government of Angola introduced basic economic reforms which touched on agriculture, in that they authorized free trade in agricultural products and encouraged private farming. In Egypt, where government control of agriculture has been pervasive and long-standing, substantial liberalization was recently brought in and produced strong and positive effects on production. In Algeria, in the transition to a market economy, nationalized land is being redistributed to private farmers, through the process is not without difficulties.

Liberalization of foreign trade has been a major element in agricultural reform: in both Zambia and the United Republic of Tanzania, private traders are now allowed to obtain licenses for international transactions in cereals, following the rescinding of monopoly

5 Fish, frozen or chilled; fish, dried, salted or smoked; crustaceans and molluscs; fish products and preparations; crustaceans and molluscs products and preparations; oils and fats, crude or refined of aquatic animal origin; meals, soluble and similar feeding stuffs of aquatic animal origin.

powers previously held by parastatal bodies. The Zambian Government abolished the system under which the Gambia Produce Marketing Board fixed the prices at which licensed buyers purchased groundnuts from farmers. Such licensing ceased and those able to deliver upwards of 55 tons could sell directly to the Board. In Uganda, the liberalization of coffee exports was introduced early in 1990, when co-operatives were licensed to export coffee in competition with the State-controlled Marketing Board. Under the investment code introduced in 1990, investors that engage in export of products other than coffee were granted a wide range of incentives. The priority investment areas which the code identified included crop-processing, fish, meat and forestry.

At the same time, the structure of incentives to agricultural production has been reinforced and improvements made in agricultural planning and programming. In Algeria, Cameroon, Egypt, Tunisia and the United Republic of Tanzania, real support prices were raised in 1990 to promote domestic production. In Côte d'Ivoire, seeds were distributed and better technical assistance given, free of charge. In an effort to diminish food imports, including food aid, the Government of Senegal continued its measures to promote consumption of niebé (black-eyed bean).

In Algeria, the Institut Technique des Grandes Cultures formulated a five-year development plan for 1990-1994, which included measures:

- (a) To ameliorate the quality of seed varieties;
- (b) To conduct field demonstrations;
- (c) To transfer improved farming techniques; and
- (d) To foster the multiplication, certification and distribution of selected seed varieties.

According to the plan, the production of main cereals would attain 3.5 million tons by the end of the plan period. In addition, the Caisse Nationale Agricole would provide loans to producers' co-operatives with a view to enabling small farmers to gain access to such vital inputs as fertilizers and seeds.

The agricultural planning and policy targets contained in the Plans of the Governments of Kenya (1988/1990-93), Madagascar (1989-1991), Malawi (1987-1996), Zambia (1987/88-1989/93), Zimbabwe (1986-1990) laid special emphasis on the strengthening of measures to bring about improvements in the management and functioning of agricultural institutions and services.

In Zaire, the new approach to development planning and policy adopted by the Government in its document Cadre de Politique Economique covering the period

1989-1992, particularly emphasized four areas, one of which related to agricultural development. The document underlined the crucial need:

- (a) To improve the rural transport network;
- (b) To formulate a plan for the rehabilitation of plantations;
- (c) To work out better policies for the supply of agricultural inputs; and
- (d) To strengthen national research and extension programmes.

A landmark in Zaire's agricultural planning and policy strategy was the effort made to articulate quantitative objectives for food self-sufficiency under a programme known as PRAAL (Programme d'Auto-suffisance Alimentaire).

In Sao Tomé and Príncipe, the Government attached considerable importance to four elements:

- (a) Stimulating agriculture as the "engine of growth";
- (b) Enhancing public sector capabilities;
- (c) Encouraging private sector initiatives by reforming existing state enterprises; and
- (d) Agricultural diversification with equal attention to export and food crops.

In Botswana, an income policy in effect since July 1990 exempts livestock owners with up to 300 head of cattle, not reared for commercial purposes, from income tax on their income arising therefrom. Income generated from dry-land farming on up to 100 hectares is likewise exempted from income tax. In Zimbabwe, new incentives have been introduced for export-oriented agricultural projects, which include sanctioning the retention by producers of up to 5 per cent of the foreign exchange that they earn.

Investment in agriculture was stepped up in a number of countries during 1989-1990. In the Sudan, £S6.5 billion or about 30 per cent of a total budgetary outlay in 1990/1991 of £S22 billion, was earmarked for agriculture in order to achieve the Government's goal of self-sufficiency in food crops. The area under irrigated cotton has been reduced to make way for food crops. In Chad, the 1990 investment budget was increased by 14.2 per cent to 106.3 billion CFA francs, a large part of which was earmarked for agriculture. The budget aimed at ensuring the attainment of basic standards in food production and cattle rearing. In the Niger, the 1991 investment budget of CFAF 80.25 billion accorded high priority to food and agriculture. In the 1990/1991 budget of Mauritania, 27.5 per cent of the public-sector investment outlay of 12.66 billion ouguija will be invested in the agriculture sector. In Namibia, the government's economic policy gives the

highest priority to agriculture and development of rural and water infrastructure.

In Morocco, an important aspect of the Government's agricultural development plan and policy approach has been and continues to be the expansion of fish production. Over the past four years more than 940 million dirhams (\$112.9 million) has been invested in the subsector. Another facet of its policy and planning strategies has been the systematic development of irrigation in order to harness its water potential of 21 billion cubic metres per annum. The area of land under irrigation was expected to reach 1 million hectares by the end of 1990. The Government plans to construct at least one dam every year up to the year 2000.

In Tunisia, several large-scale irrigation projects have been launched. Dam capacity is planned to increase from 1,500-2,500 million cubic metres between 1990 and the year 2000, by which time the authorities forecast that potable water requirements will have increased by 20-30 per cent. The Seventh Plan for the country allocated around \$720 million to hydraulics. Siliane dam in the west of the country, its fourth largest, was completed in late 1987 and the construction of other dams was planned at Sejnane, El Houareb, Barbara and Kairouan.

In the Libyan Arab Jamahiriya, the Great Man-Made River project has entered its second phase, which involves the construction of a pipeline 1,100 km in length connecting the Fezzan underground water reservoir with Tripoli and the western coastal region. Another important government activity is the vigorous combating of the screw-worm epidemic.

2. At the intergovernmental level

Intergovernmental organizations have designed policies to accelerate the development of the agricultural sector. Mention should be made of the Arab Maghreb Union, the Economic Community of the Great Lakes Countries, the Economic Community of Central African States (ECCAS), the Economic Community of West African States (ECOWAS), the Inter-Governmental Authority on Drought and Development (IGADD), the Eastern and Southern African Preferential Trade Area (PTA) and the Southern Africa Development Co-ordination Conference (SADCC). Those organizations have laid particular emphasis on food security, food self-sufficiency, agricultural research, training and inter-State trade in food and agricultural commodities. Both IGADD and SADCC have attached special

importance to the promotion of food security. An in-depth study in the IGADD countries (Djibouti, Kenya, the Sudan and Kenya) and a project in the SADCC countries, currently underway, deal with that subject. At a meeting held at Kigali (Rwanda) in February 1990, ECCAS and the Central African Customs and Economic Union, discussed various issues relating to agricultural development and in particular the need to co-ordinate and harmonize agricultural plans and policies in such critical domains as research, animal disease control, training and production of inputs.

There is still a long way to go in actions to foster inter-State co-operation in agricultural development through the formulation and execution of region-wide plans and policies on the basis of well-planned and regular consultations. That situation is due in part to chronic resource problems and to inefficiencies in the institutions concerned. There have also been apparent inadequacies in the dialogue about policy and in effecting harmonization among intergovernmental organizations, donors and United Nations agencies. The consequence is bound to be a blurring of the prospects for enhanced inter-country co-operation in the development of agriculture in the region.

3. The effects of policy changes outside Africa

Policy changes outside the region have also to be taken into account. In particular, the policies adopted by the United States and EEC have profound effects on the international trade in agricultural products and therefore on the fortunes of farmers in developing countries. The EEC farm support system, which provides for high support prices and effectively closes the EEC market to imports, has led to the dumping of EEC farm surpluses on international markets, with adverse consequences for developing countries: they are prevented from fully enjoying their comparative advantage in agriculture. The outcome of the current Uruguay round of GATT trade talks is thus of particular importance. United States farm policies are also important, since that country is a major exporter of agricultural products. The United States has been pressing for major changes in the EEC farm policy, a position which is quite close to that of the developing countries. Its farm support Act, which emphasizes conservation and provides for the removal of 65 million ha. of farm lands from production, will have far-reaching consequences on international trade and food security.

VIII. ENERGY AND MINING

A. Energy

1. The Energy Situation in Developing Africa

According to United Nations data⁶, developing Africa's energy production in 1988, including both commercial energy and traditional fuels, reached 18,179 terrajoules or approximately 434.2 million tons oil equivalent (TOE). However, energy requirements, i.e., total energy use within the region, amounted to only 208.7 million TOE: most of the oil produced was exported. Total consumption was 200.1 million TOE, or only 347 kg per head. Among the world's regions, only Asia has a comparable (though somewhat higher) level of energy consumption; and the level in developing Africa is less than a third of the world average.

Table VIII.1 below, derived from the same source, shows the growth in energy requirements during the period 1980-1988. Since 1988, the situation has not changed substantially: according to *British Petroleum Statistical Review of World Energy*, in 1989 primary energy consumption in Africa reached 215.9 million TOE, an increase of 2.1 per cent over 1988⁷.

In 1988, total energy production was slightly under its 1980 level: commercial production had declined steeply in 1980-1982 and, though it has recovered, it was in 1988 still 2.4 per cent less than in 1980. Production of traditional fuel, which is not accurately measured, is estimated to have grown at an average annual rate of only 0.9 per cent in 1980-1988. The trend of commercial energy production has been determined since 1980 largely by the OPEC quotas for oil production, not by energy demand in the region.

Energy requirements and consumption grew at average annual rates of 2.1 per cent and 2.4 per cent, respectively, in 1980-1988. However, while the consumption of traditional fuels has been nearly stagnant (see table VIII.2 below), that of commercial energy has expanded rapidly — at 4.2 per cent a year during 1980-1988 — the data showing a considerable,

probably spurious, rise of 11.5 per cent in 1988.

Table VIII.1
Energy requirements in developing Africa, 1980-1988*
(Thousand terrajoules)

	Solids	Liquids	Gas	Primary Electricity	Traditional Fuel	Total
1970	194	1014	15	90	3031	4344
1975	196	1432	134	131	3549	442
1980	173	2010	686	679	3845	7393
1981	181	2239	603	604	3372	6999
1982	193	2302	491	608	3492	7086
1983	197	2434	758	591	3569	7549
1984	216	2468	537	545	3911	7677
1985	219	2392	733	543	4064	7951
1986	263	2508	880	557	4196	8404
1987	296	2556	775	524	4304	8455
1988	304	2589	1175	524	4149	8741

Source: United Nations, *Energy Statistical Yearbook*, 1983, 1984, 1987 and 1988 (New York).

* In this table, requirements exclude the energy used during the process of production of the final form of energy in which it is consumed.

In the 1970s, however, commercial energy consumption had grown twice as fast — an annual average of 8.4 per cent — and total energy requirements had expanded by an average 5.1 per cent a year. There has therefore been a major deceleration in the growth of energy use in the region, in line with the economic crisis which started around 1981-1982 and brought the average annual rate of output growth down to only 1.7 per cent in 1980-1989 from more than 4 per cent in the 1970s. The basic structure of the supply of and demand for energy did not change fundamentally in 1980-1988, despite the pressure to diversify away from oil and the search for substitutes. In 1988, traditional fuels represented 47.5 per cent of total requirements, compared to 52 per cent in 1980, but the decline did not constitute a trend, since the ratio fluctuated around an average of nearly 50 per cent.

⁶ *Energy Statistical Yearbook*, various editions.

⁷ The statistics compiled by British Petroleum are not comparable with those in the table, since they do not provide data for the region of developing Africa. Nevertheless, the per capita consumption for Africa of 344 kg oil equivalent in 1988 which they imply is in good agreement with the 347 kg calculated from data in the table.

The apparent decline between 1980 and 1988 was probably due to the lack of precision in the data, which means that the overwhelming majority of the population of the region still relies on fuelwood, charcoal, crop residues and animal dung for their energy requirements. In fact, in non-oil

hydrocarbons accounted for 38.4 per cent and primary electricity for 8.6 per cent — proportions which did not significantly increase during the 1980s. There has been a steady increase in the use of solid fuels, but this was confined to the countries of southern Africa with coal resources.

Table VIII.2
Commercial energy consumption in developing Africa, 1980-1988
(Thousand terrajoules)

Year	Solids	Liquids	Gas	Primary	Commercial energy total	Traditional fuel	Total
1980	177	2010	686	179	3051	3845	6896
1981	191	2162	580	174	3108	3372	6480
1982	203	2207	804	176	3389	3492	6881
1983	201	2293	775	172	3441	3569	7010
1984	217	2468	537	164	3385	3911	7296
1985	219	2392	733	164	3327	4064	7391
1986	263	2508	880	168	3819	4196	8015
1987	296	2555	775	158	3786	4304	8090
1988	304	2590	1175	158	4227	4149	8376

Sources: United Nations, Energy Statistical Yearbook, 1983, 1984, 1987 and 1988

importing countries of the region, fuels may represent 90 per cent or more of total energy requirements: that is the case for Chad (92 per cent), the Central African Republic (92 per cent) and Ethiopia (90 per cent), to quote only a few examples. In the period 1980-1988, while solid fuels and gas have contributed an increasing share of energy requirements — from 11.6 per cent in 1980 to 16.9 per cent in 1988 — the utilization of both fuels growing by nearly 7 per cent a year, the share of liquid fuels, mainly oil, has not changed significantly and in 1988 was still nearly a third of total requirements. Surprisingly, primary use of electricity has declined rapidly since 1980 — by some 3.2 per cent a year.

Oil-exporting countries inevitably present a pattern of energy requirements which is quite different from that of oil importers. In 1988 the share of traditional fuels for this grouping was quite low: 27.4 per cent only. It was practically zero for North African oil exporters. Hydrocarbons, including gas, supplied 67.7 per cent of the total requirements of the grouping in that year, gas accounting for 22.4 per cent, compared to 19.2 per cent in 1980. However, the share of primary electricity is in decline, probably because those countries find it cheaper to rely on their plentiful oil and gas resources.

Traditional fuels supplied 68.4 per cent of total energy requirements of oil importers in 1988, of which

The intensity of energy use, as measured by consumption per thousand constant dollars of GDP, has remained at around 0.5 TOE since 1980, so that hardly any gain has been made in that area. Intensity of oil use has fluctuated but was higher in 1988 than in 1980 at 0.15 tons per thousand dollars. The African region has not been able, therefore, to shift energy consumption away from oil. As for the sectoral structure of utilization, data from the International Energy Agency (IEA)⁸ for the year 1986 show that final consumption of 106.1 million TOE of commercial energy was distributed in the proportions of 38.5 per cent for industry, 25.2 per cent for transportation and 36.3 per cent for other uses. The share of oil consumption attributable to transportation was 47.0 per cent, while industry consumed only 18.7 per cent. The generation of electricity represented 29.2 per cent of total energy generation.

2. Oil and Natural Gas Exploitation and Development

African countries are dependent on the investment and know-how of multinational oil companies for the exploration and development of their oil and natural gas resources. Such activities by those companies depend, in turn, on many factors, among them the regulations set by Governments, which are a determining factor for the profitable exploitation of oil

⁸ International Energy Agency, *World Energy Statistics and Balances, 1971-1987*, (Paris, 1989).

and natural gas deposits. In that regard, a growing number of countries have introduced new legislation or modified existing legislation with the object of providing incentives to foreign investment in their oil industries. That has made for a significant increase in oil exploration activity around the region: at the present time, the search for oil and gas is underway in some 35 countries, among them 12 oil producers. According to the British Petroleum Statistical Review of World Energy, at the end of 1989 African oil reserves stood at 58 billion barrels, or 5.96 per cent of world reserves. During 1990, new reserves were discovered and new wells came into operation.

(a) Oil

In Ghana, which produces small quantities of oil, hopes of the country becoming a significant producer of oil and natural gas have been boosted by the disclosure that the first well drilled in the Tano basin had shown "promising prospects" of natural gas.

In Cameroon, the drive to attract new investment in oil exploration and development got off the ground in 1990. The new Hydrocarbon Code dispenses with ring fencing; gives companies the possibility to amalgamate the gains and losses under various permits; and provides improved terms with regard to production sharing and development and production costs. The relatively unfavourable conditions encountered by oil companies in the past — in particular, the high level of taxation — discouraged the search for new reserves and thus led in due course to a decline in oil production.

Botswana is undertaking considerable exploration and drilling activities in the Kalahari desert, an area which may contain important petroleum reserves.

In Gabon, where production was thought to be set to decline, prospects have been transformed by recent assessments that the country's reserves may be over 1,100 million barrels of oil. In 1990, the Rabi Kounga inland deposit, with estimated reserves of 425 million barrels, came into production and further discoveries were made by the company Elf Gabon in the area of its Eyana and Diamango permits.

The Taiwan Overseas Petroleum Investments Corporation has started a preliminary exploration programme in the northern part of Namibia, which includes mapping and seismological studies.

In Angola, where oil production is increasing rapidly, new deposits were identified in 1990 at the Soya, Estrela, Mora and Saxvelha blocks.

In Nigeria, the development of the new Oso oil field, with reserves of 500 million barrels, and of the Edop field is underway. The latter project is costed at more than \$1 billion. Present oil reserves stand at 17 billion barrels and the authorities are planning to raise that to 20 billion.

(b) Natural gas

The situation with regard to natural gas has been influenced by the African producers beginning to meet domestic energy requirements with gas in order to free oil for export. Algeria and Egypt have been the leaders in making that move.

In Nigeria, the Government decided to build the first natural gas plant in the country, which was scheduled to start operating in 1991. The project, whose cost was estimated at \$3.5 billion dollars, would produce 4.5 million tons of natural gas a year. Another project is intended to recover daily 300 million cubic feet of gas which is presently flared. The plant will produce the condensates propane and butane for export and residue gas is to be distributed by the Nigerian Gas Company.

Development of natural gas production is also taking place in Tunisia where, in view of a steady decline in oil production in recent years, it appears to offer better potential. Gas reserves have been estimated at 84-180 billion cubic metres, the most promising field being at Miskar, in the Gulf of Gabes.

Algeria launched a plan to stimulate higher domestic consumption of gas, which involves the creation of distribution networks and the encouragement of use by industry and the transport sector. In that connection, an interesting experiment is the introduction of the use of compressed natural gas (CNG) in place of gas oil by heavy transport vehicles.

3. Electricity

The trend of electricity production is disturbing: the United Nations Energy Statistical Yearbook shows that primary production, i.e., hydroelectricity, fell steadily in 1980-1988 to only 73 per cent of the 1980 level; and IEA⁹ (World Energy Statistics, 1981-1987; OECD/IEA, Paris, 1989) data indicate that output fell from 60.2 GWh in 1980 to only 46,246 GWh in 1987,

9 World Energy Statistics, 1981 - 1987, OCDE/IEA, Paris, 1989.

while it had doubled in 1971-1980.

Even though regional electricity production has grown by 4.2 per cent per annum to 136,520 GWh in 1988, the magnitude of that trend is a cause for concern, bearing in mind the considerable hydroelectric resources of the region — the falls on the Congo River at Inga in Zaire have a reported annual delivery potential of 300,000 GWh — and the very low level of energy consumption. (The majority of the African population, it should be mentioned, is connected to electrical power.) During 1985-1988, whereas total generating capacity grew by 4,786 GW, hydroelectric capacity increased by only 430 GW — a very small amount.

In some countries, however, significant progress has been recorded. Efforts have been made to substitute for oil in electricity generation by using solar power, for which small generating systems have now reached the commercial stage and are undergoing trials in Ethiopia and Senegal. In other countries, hydroelectric capacity is being created: such is the case in Ethiopia,

where dams are under construction at Gelgel-Gibé. Unfortunately, such large projects as the dam at Manantali on the Senegal river have not yet become operational because of the need for additional investment and of the political problems in the area. The goal of bringing electricity to the whole population and particularly to the rural areas has not been abandoned, however. In Tunisia, for example, it was expected that 80 per cent of households would be connected to the electricity grid by the end of 1991.

As can be seen from table VIII.3 below, electricity production has increased substantially in some African countries, e.g., Ethiopia, Nigeria, Tunisia and Zimbabwe, while net decreases have been recorded in others.

4. Non-commercial Energy: an Overview

As seen in subsection 1 above, traditional fuel, in the shape of firewood, remains the main energy source for about 90 per cent of the population of developing Africa, despite its increasing scarcity and the great

Table VIII.3
Electricity Production in selected African countries, 1985-1989
(Gigawatt-hours)

	1985	1986	1987	1988	1989*
Algeria	11220	11568	12120	13320	12772
Botswana	436	427	978	1112	1881
Cameroon	2284	2484	2460	2412	2508
Cote d'Ivoire	2012	1842	2196	2208	2139
Egypt	30000	32300	36053	40200	36480
Ethiopia	784	823	850	1350	1873
Ghana	3072	4440	4680	4752	4836
Kenya	2109	2258	2563	2772	2852
Libyan Arab Jamahiriya	7522	7500	..	7920	9500
Madagascar	383	382	396	516	447
Malawi	480	516	471	468	624
Mauritius	398	438	487	636	549
Morocco	770	6928	7256	8628	7764
Namibia	1785	1556	1601	1763	1835
Nigeria	10138	10686	11067	11275	12640
Senegal	756	750	778	763	767
Sudan	1218	1316	1408	1857	1568
United Republic of Tanzania	792	792	780	780	708
Tunisia	4055	4215	4546	4284	4488
Uganda	626	637	611	564	660
Zaire	4907	5163	5500	5392	5314
Zambia	10061	9808	8414	8328	6744
Zimbabwe	4889	5858	7606	7896	9796

Sources: UN, Monthly bulletin of statistics (1990, various issues); and ECA Secretariat.

* = Preliminary.

physical effort involved in gathering it.

Wood fuel and its derivatives (mainly charcoal) account for 50-90 per cent of energy consumption; and an estimated 75- 85 per cent of all the wood burned as fuel is used in the domestic sector. Since no sustained effort of reafforestation has been made, a rapid depletion of the biomass stock has occurred in certain areas, resulting in severe environmental degradation. Even in Zaire, which is in the tropical humid zone, the forested area has declined significantly in the last 40 years or so.

The seemingly unstoppable trend toward deforestation and the depletion of wood resources has made it increasingly difficult and time-consuming for small farmers to collect firewood. The distances walked to collect firewood in some countries have increased sharply. In the Sudan, for example, the acacia tree (which is used as firewood) was common around Khartoum but is now found only at about 90 km south of the city. In Zambia, the forests around Lusaka have been destroyed and charcoal is now produced 130 km away from the capital. It is estimated that 9,000 sq km of forest was destroyed in Zambia in 1989 to produce charcoal. In the United Republic of Tanzania, whereas women of the Nyakyusa tribe in the south-west part of the country are reported to spend between two and five days a month searching for fuel, in the central area of the country people have to spend 20-25 days a month in search of firewood.

Though firewood harvesting has serious adverse effects, there is at present no immediate and cheap alternative for the majority of the population. Several solutions have been proposed during the last decade, including solar energy, more efficient cooking, charcoal production, reforestation and the introduction of fast-growing fuel trees. Unfortunately, those alternatives have still to be adopted on a sufficient scale, and the relationship of costs to benefits for the population concerned, as well as the social context involved, do not seem to have been taken into account in all cases. There is evidently an economic calculation which the peasant or farmer makes who compares the extra labour involved in, for example, tree conservation and replanting with the benefits of the present methods of firewood harvesting. Another drawback of fuelwood harvesting is the impact on the environment through the release of large quantities of CO₂ gas during forest fires. That contributes to global warming and, according to the *Scientific American* (special issue on world energy, September 1990), developing countries — including those in Africa — contribute 23 per cent of global emissions of carbon gas, with Côte d'Ivoire, Nigeria and Zaire among the major "polluters".

Those findings lend urgency to the issue of non-commercial energy consumption in Africa and require that Governments renew their efforts: (a) to find and make available practical substitutes for fuelwood; and (b) to promote more efficient use of forest resources.

B. Mineral Fuels

Mineral fuels are among the commodities whose international prices have a long history of volatility. Table VIII.4 below summarizes the movement in prices during 1986-1990. The underlying causes are discussed in the subsections related to individual fuels which follow.

Table VIII.4
International prices of mineral fuels, 1986-1990
(dollars per unit)

	Unit	1986	1987	1988	1989	1990
Coal (Australia)	Ton	39.27	34.28	36.29	41.61	42.99
Crude oil (Brent)	Barrel	14.54	18.34	14.37	18.22	23.69
Natural gas (EEC imports c.i.f.)	TOE	132.82	93.78	91.15	87.28	109.95a
Uranium (Nuexo, spot price)	lb	30.00	36.67	31.82	26.00	29.50

Sources: UNCTAD, Monthly commodity price bulletin (1990, various issues); Engineering and Mining Journal (1990, various issues); International Financial Statistics, vol. XLIV, No. 2; and ECA Secretariat.
a/ First nine months.

1. Oil

Oil prices, which had firmed in 1989 and risen to an average of \$18.22 a barrel for Brent crude, compared to \$14.57 in 1987, started to weaken at the beginning of 1990. Low demand in industrial countries, due to recession and over-production by some OPEC members under financial pressure, brought down prices to only \$16 a barrel by the end of July 1990. At that point, a new OPEC quota agreement resulted in a recovery: prices increased to the OPEC benchmark of \$21 a barrel. Subsequently, the invasion of Kuwait by Iraq on 2 August 1990 plunged the market into chaos. Prices exploded because of fears that supplies would be disrupted. When the United Nations imposed an embargo on Iraq, both Kuwaiti and Iraqi supplies were removed from the market and prices reached \$40 a barrel by the end of October. However, the suspension of the OPEC quotas, together with the decision to allow OPEC members to raise production, quickly re-established equilibrium in the market, though prices remained around \$30-35 a barrel in the second half of 1990. For 1990 as a whole, Brent crude averaged \$23.69 a barrel, 30 per cent more than in 1989.

Fig. 9 Oil prices, 1990, Brent



That situation enabled some African exporters with excess capacity to increase production and take advantage of the higher prices. Table VIII.5 below gives details of production by African developing countries in 1986-1990).

In particular, Algerian production rose by 11 per cent; production in the Libyan Arab Jamahiriya, which averaged 1.11 million barrels a day (b/d) in 1989, rose to 1.4 million b/d in 1990; and in Nigeria output

increased by 10.4 per cent in comparison with 1989 to 1.8 million b/d. The very large increase of production (28 per cent) in Gabon was mainly the result of the coming on full stream of the Rabi Kouna inland oilfield. Other countries, such as Angola and Egypt, recorded more modest increases: Angolan output rose to an average of 500,000 b/d or approximately 25.3 million tons a year. Oil production in developing Africa is estimated to have reached

Table VIII.5
Oil Production in Developing Africa, 1986-1990
(Million of tons)

	1986	1987	1988	1989	1990
Algeria	48.9	48.9	50.7	55.3	60.9
Gabon	8.3	7.7	8.0	10.6	13.6
Libyan Arab Jamahiriya	52.0	49.0	50.8	55.0	68.2
Nigeria	74.0	67.0	68.3	80.3	88.7
OPEC subtotal	183.2	172.6	77.9	201.3	231.5
Angola	14.2	18.1	23.2	22.6	23.2
Cameroon	8.9	8.3	7.8	8.6	8.3
Congo	6.0	6.3	7.1	7.4	7.8
Cote d'Ivoire	0.9	0.8	0.7	0.6	0.6
Egypt	40.2	45.2	42.6	44.0	46.3
Ghana	0.10	0.1	0.1	0.1	0.8
Tunisia	5.2	5.0	4.8	4.9	4.6
Zaire	1.6	1.6	1.4	1.3	1.3
Non-OPEC subtotal	77.1	85.3	87.7	89.7	92.9
Developing Africa Total	260.3	258.0	265.5	290.9	324.4

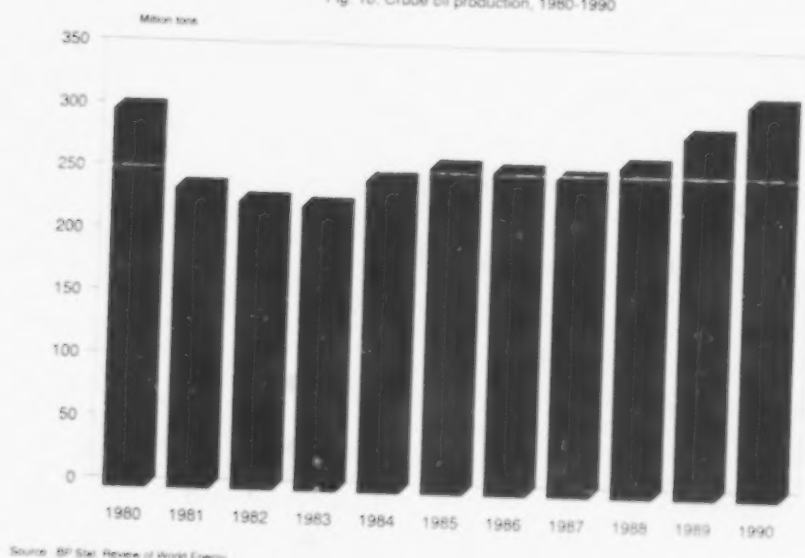
Sources: UNCTAD, Monthly commodity price bulletin (1990, various issues); Engineering and mining journal/OPEC bulletin, November/December 1990 and ECA Secretariat

324.4 million tons in 1990 (6.4 million b/d) compared to 290.9 million in 1989, a significant 11.5 per cent growth. OPEC members produced 231.5 million tons (15 per cent) more than in 1989, while non-OPEC production reached 96 million tons (7.8 per cent more).

developing Africa was constrained by such factors as lack of investment, poor physical infrastructure and poor management.

In Zimbabwe, after three years of growth at an average rate of 13.5 per cent, production declined by 1.1 per cent in 1989 and increased by only 2.5 per cent in

Fig. 10: Crude oil production, 1980-1990



With higher oil prices, countries such as Algeria, Nigeria, the Libyan Arab Jamahiriya and Gabon have earned large revenues and their current account positions have improved — in some cases, dramatically. Nigeria achieved a net surplus on current account for the first time in recent years (in 1989 the deficit had reached \$2 billion), enabling the country to pay off its debt arrears. Additional export revenues from oil may have been worth \$15.5 billion to African developing countries in 1990. Not all oil producers shared in the windfall, however: Egypt, in particular, did not do so. Moreover, in 1991, even before the outbreak of war in the Gulf, oil prices started to decline, wiping out the profits made in August-December 1990.

2. Coal

Although coal production increased in 1988 by 5.7 per cent, it remained small in relation to both coal reserves (7,562 million tons) and the region's energy needs. In 1989, though prices were rising on international markets due to the tight supply conditions which had prevailed since 1987, production in

1990.

In Zambia, production increased by 33 per cent in 1988, but fell 36 per cent in 1989, to rise again by 8.5 per cent in 1990. It was expected that, with the completion of the Maamba mine rehabilitation programme, coal production might well rise to 700,000 tons a year from 1991.

In Nigeria, official data show coal production in rapid decline from 144,000 tons in 1986 to only 84,000 tons in 1990. The authorities proposed to rehabilitate the National Coal Corporation in the framework of the plan for the balanced development of energy resources.

3. Natural Gas

Reserves of natural gas in developing Africa, at 7.5 trillion cubic metres¹⁰, were in all probability under-estimated, because of the limited surveys and exploration carried out. The high cost of infrastructure has also restrained the development of this fuel, the utilization of which requires the creation of a network

¹⁰ British Petroleum, Statistical Review of World Energy London, June 1990.

of pipelines and other distribution systems.

Moreover, until the recent past, many oil producers were flaring off or at best re-injecting the gas produced on oil fields. In Nigeria, for example, which has proven reserves of 2.6 trillion cubic metres (15 times the annual consumption of Belgium, France, Germany, Italy, Spain and the United Kingdom combined), some 18 billion cubic metres of gas with a potential value of \$4 billion are flared each year. That policy has fortunately been abandoned and most oil producers presently strive to utilize their gas resources to the full. In 1990, regional production was accordingly estimated to have grown by 7.3 per cent to 72.2 billion cubic metres, largely on account of the increase in Algerian output to 40.8 billion cubic metres.

Algeria remained the leader in African gas production, with reserves estimated at the end of 1989 at 114.0 trillion cubic feet (3.2 trillion cubic metres), amounting to 2.9 per cent of world reserves. Its production in 1990 represented 42 million TOE, which was equal in magnitude to its oil production and provided nearly half its export revenues. The Government recently reviewed its gas policy in the framework of its economic liberalization programme, particularly in matters of pricing and co-operation with foreign companies. New markets are assiduously pursued; new contracts have been signed with Turkey, Greece and Belgium; and exports of liquefied gas to the United States of America are to be resumed. The contract with Italy is particularly important in that it provides for the annual sale of some 9 billion cubic metres of gas. Algerian exports, in billion cubic metres, increased by 24.3 per cent in 1989 to 26.73, increased again in 1990 to 30.1 and are expected to rise to 38 in 1991.

In Egypt, which has natural gas reserves estimated at 0.3 trillion cubic metres, production rose to 5 million TOE in 1989. Consumption increased to 6.3 million TOE in 1989 and to 6.8 million TOE in 1990.

In the Libyan Arab Jamahiriya, annual production has fluctuated in the last 10 years in the range of 3-6 million TOE, but steady efforts are now being made to develop gas production and exports.

Prices for natural gas imported into Western Europe fell slightly in 1989 to \$2.1 per million British Thermal Units (BTU) from \$2.3 in 1988 but recovered sharply in 1990. According to IEA, exports by pipeline in 1989 to Europe were valued at \$85.21 per TOE f.o.b. in the Netherlands but their price had risen to \$123.04 by the second half of 1990.

4. Uranium

Uranium production in developing Africa declined slightly in 1989 to 6,947 tons from 7,160 tons in

1988. In 1990, production continued to fall, due to a reduction in Namibia by some 400 tons below the capacity level of 4,540 tons. In the Niger, though production is 1,000 tons below capacity, it increased by 8.9 per cent in 1990. In the short term, no significant change is expected in that country. In Gabon, where production had fallen by 7.3 per cent in 1989 the level in the first half of 1990 was running 34 per cent down on 1989. The main factor in the decline has been the low demand, due to the slowdown or virtual interruption of nuclear programmes generally, which intervened after the Three Mile Island incident in the United States and the catastrophe at Chernobyl in the USSR. Since the former event, regulation of nuclear plants has been considerably tightened and operating costs have increased in consequence. At the same time, costs have risen considerably because of longer delays in plant certification and security-induced changes in plant design. The world price of uranium has fallen and African producers such as Gabon and the Niger have been able to continue producing only because of guaranteed prices from France.

5. Energy policies

While the energy resources of developing Africa are considerable, their unequal distribution, the fact that they have yet to be adequately surveyed and the lack of capital make for a level of utilization which is far below potential.

Energy policies will rightly vary from country to country according to energy endowment and to other factors, but policy objectives remain quite similar. A paramount objective is, of course, to reduce dependence on oil in those countries which are oil importers. That implies efforts to diversify energy supplies and to find substitutes for oil in energy generation.

In Mozambique, for example, a major goal is to supply households with energy products less expensive than oil-based ones — such as wood and coal.

In Ethiopia, the central issue is diversification away from petroleum in a country where deforestation has made fuelwood expensive, some part of the country being even almost treeless. The Government is therefore actively creating new hydroelectric capacity while undertaking a huge reforestation programme which is exceptional in Africa for its dimensions and success.

In the Congo, a vast restructuring of the energy sector has been carried out which affects all aspects of the industry, including research, production and distribution.

A promising initiative is the efforts made at subregional level to inter-connect countries in a single electric grid. The Union of African Producers, Transporters and Distributors of Electricity aims at connecting countries from Mauritania to Zaire, so that those with power deficits will be able to import electricity from those which are better supplied. Phase I of the project would link the Ghana and Nigeria grids, phase II those of Burkina Faso, Côte d'Ivoire, Guinea, the Niger and Sierra Leone.

C. Non-fuel minerals

1. Recent trends

The performance of the mining sector in developing Africa with regard to non-fuel items has been disappointing, at least since 1987. In some cases, ore depletion may have been a factor, but the most important cause is the lack of incentives for high-risk exploration and for private-sector investment — although since 1989 the situation is improving in a few countries. Ghana, for example, has made considerable efforts to attract foreign investment in gold mining. State-dominated mining enterprises, for their part, have made insufficient investments; and high costs and inadequate working capital have otherwise affected most mining projects. The rate of capacity utilization has therefore been quite low at most mining sites.

Table VIII.6 below shows regional production of the main commodities in 1986-1990. Table VIII.7 below gives corresponding international prices in 1986-1990.

An ECA index of mining production (excluding hydrocarbons) weighted by 1985 prices shows that production increased by only 1 per cent in 1989, and that it remained constant in 1990. At country level, the picture is equally disappointing: the mining value added in mineral-exporting countries fell by 3.2 per cent in 1990 and the annual average rate of growth was only 0.4 per cent in the period 1980-1990. In Zaire, production volume has been declining since 1987 and was below the 1970 level in 1989. The aging of equipment and the difficulties encountered by the mining sector in terms of transport, power supply and production inputs are the main causes of that situation. In Zambia, where mining is the mainstay of the economy, value added was lower in 1990 than in 1985. Only in Botswana has there been a good performance: mining has doubled in volume since 1980, providing considerable export revenues. The Botswana experience is not comparable with that in other countries, because it has been based on the special conditions which obtain in diamond mining.

The slowdown in the economies of the industrialized countries, coupled with increased mine production, caused mineral prices to fall during the second half of 1989. Some minerals, such as nickel, aluminium and

Fig. 11: Mining production Index, 1980-1990
(per cent)

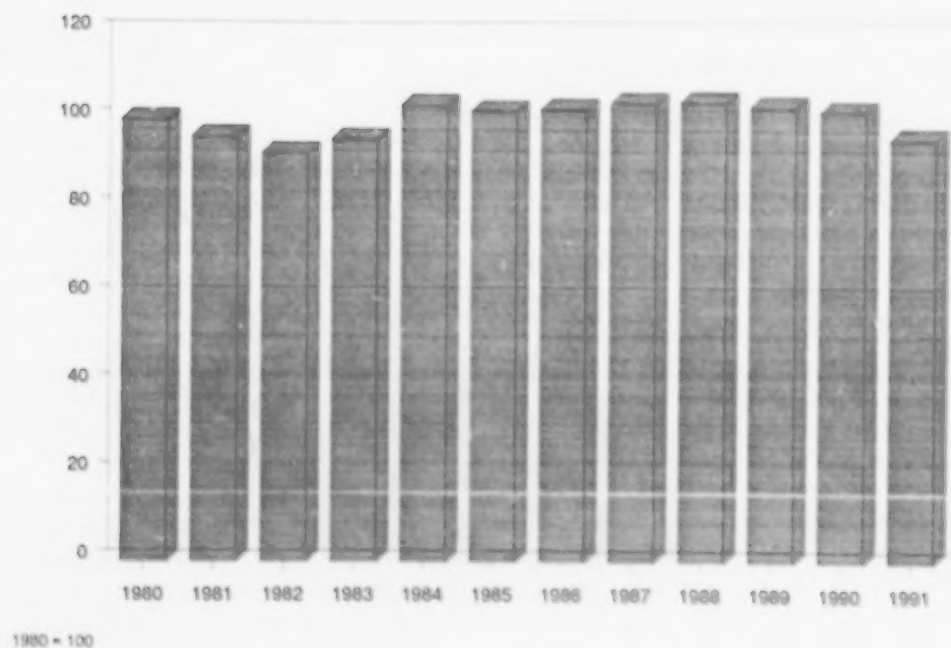


Table VIII.6
Mine Production in developing Africa, 1986-1990

	Unit	1986	1987	1988	1989	1990 a/
Alumina	Thousand tons	571.0	542.0	593.0	626.0	620.0
Aluminium	Thousand tons	383.0	401.0	424.0	435.4	440.5
Antimony	Tons	1050.0	620.0	393.0	276.0	276.0
Bauxite	Thousand tons	16309.3	17899.2	18002.9	19437.7	19292.4
Cobalt	Tons	18895.0	16589.0	15129.0	13901.0	16871.0
Copper	Thousand tons	1123.7	1119.2	1037.0	1035.5	1042.0
Diamonds	Thousand carats	36654.0	36975.0	34437.0	35253.0	35555.0
Gold	Tons	26.6	29.6	29.2	34.1	35.4
Iron	Thousand tons	32051.0	30051.0	30823.0	29982.0	31091.0
Lead	Thousand tons	137.1	131.5	130.6	106.6	106.5
Manganese	Thousand tons	2867.5	2681.1	2527.9	2813.0	2674.0
Nickel	Thousand tons	30.7	28.9	34.6	32.5	29.4
Phosphate	Thousand tons	33438.0	34455.0	39382.0	32789.0	34879.0
Silver	Tons	382.4	344.1	376.7	412.2	383.0
Tin	Thousand tons	3.9	4.5	5.9	5.0	5.0
Uranium	Tons	7493.0	7234.0	7160.0	6947.0	5800.0
Zinc	Thousand tons	200.8	213.1	184.8	174.8	80.1

Sources: World Metal Statistics Yearbook, 1990 and ECA Secretariat.
a/ Preliminary.

copper, were hit by particularly steep falls because of their importance in industry. The bull market which started in 1988 thus came to an end. In 1990 the decline continued and, according to the IMF index, mineral prices fell by 9.5 per cent on average in 1990, though that assessment runs counter to indications

given by other sources. Thus, the United Nations index of mineral prices (excluding oil) shows a growth of 14 per cent in the first three quarters of 1990. But the fall of the metals price index calculated by The Economist by nearly 14 per cent in 1990 in dollar terms and by 18.5 per cent in SDRs does confirm that the decline

Table VIII.7
Prices of non-fuel minerals, 1986-1990
(Dollars per unit)

	Unit	1986	1987	1988	1989	1990 a/
Aluminium	lb	0.5	0.7	1.1	1.8	1.7
Bauxite	Ton	164.8	164.7	164.7	187.0	190.0
Cobalt	lb	11.7	11.7	7.0	7.5	8.4
Copper	lb	0.6	0.8	1.1	1.2	1.2
Diamonds	Carat	45.4	54.1	76.4	79.6	79.5
Gold	oz.	367.6	446.4	437.0	381.4	384.2
Iron ore	Ton	21.8	22.2	23.1	26.4	23.2
Lead	lb	0.1	0.3	0.3	0.4	0.4
Manganese ore	Ton	137.5	127.5	165.0	285.1	395.3
Nickel	lb	1.7	2.2	6.2	6.0	4.0
Phosphate rock	Ton	34.2	31.0	36.0	40.8	40.5
Silver	oz.	5.4	7.0	6.5	5.5	4.9
Tin	lb	2.9	3.1	3.3	3.9	3.8
Zinc	lb	0.3	0.3	0.5	0.7	0.6

Sources: UNCTAD, Monthly commodity price bulletin (Nov. 1990); Engineering and Mining Journal (1990, various issues); and ECA Secretariat.
* Preliminary.

on the mineral markets in 1990 was large. In any case, the ECA wholesale price index for minerals indicates a fall of 3.6 per cent in 1990. The subsections which follow discuss the situation for individual commodities.

2. Aluminium and Bauxite

Despite strong demand for aluminium, especially for beverage containers and transportation, and its increasing substitutability for other metals in industrial usage, production in developing Africa increased by only 2.6 percent in 1989. That outcome was understandable, given the large quantities of electricity which aluminium production requires and the existence in recent years of excess production capacity.

Bauxite production, which rose by 8 per cent in 1989, fell slightly in 1990. Production probably did not greatly change in Guinea (the available information is not very clear), but Ghana's output fell by 37 per cent in 1989 because of power shortages arising from the low water levels in Lake Volta. However aluminium production in Ghana did increase by 3 per cent, while Cameroon maintained its 1989 production level. As a result, regional production of aluminium rose by 1.2 per cent in 1989.

Aluminium prices, which had risen considerably in reaction to the boom in industrialized economies, plunged by 57.6 per cent in 1989 and in 1990 by a further 16 per cent.

3. Cobalt

In spite of the market stability brought about by the concerted action of the two main African producers, Zaire and Zambia, regional production of cobalt fell by 8.1 per cent in 1989, mainly as a result of repeated power cuts at the Gecamines in Zaire.

In 1990, as a result of a cave-in at Zaire's Kamoto underground mine in early September, with possible output losses of more than 200 tons a month, fears of reduced supply boosted market prices. However, on the basis of results for the first six months, Zaire production for the year could still exceed 10,300 tons or practically the 1988 level. In Zambia, the ZCCM production dropped by 3 per cent during the first quarter due to maintenance work in a cobalt refinery, but production for the year is estimated at some 4,353 tons, only 2 per cent less than in 1989.

Cobalt prices were generally firm during 1990 and with the fear of shortages from the cave-in at Kamoto and general unrest in Zaire, both Zambia's ZCCM and Zaire's Gecamines announced a rise in prices to \$11 per lb in 1991 compared with \$8.40 in 1990.

4. Copper

The year 1989 ended on a somewhat disappointing note for African copper producers. The price recovery early in the year did not last: in the fourth quarter prices per lb averaged \$1.19, giving an average of \$1.20 for the whole year compared to \$1.29 in 1988. Those prices did not encourage higher production and in the event regional production, already beset by technical and financial difficulties, barely increased. In Zambia, despite rioting and looting in the Copper Belt during 1989, production actually increased by 7.1 per cent. In 1990, however, it declined by 7.4 per cent, because rapid depletion has made it increasingly difficult to get to the ore. In Zaire, current estimates set production in 1990 at only 368,400 tons compared to 448,800 tons in 1989, with a possible fall to 350,000 tons in 1991.

Such trends have helped to boost prices somewhat, they declined sharply in the fourth quarter of 1990, with an average loss of 6.5 per cent on the year. Because of lower production in Zaire and Zambia, however, the level of prices is expected to be around \$.95 per lb in 1991.

5. Diamonds

Regional production of diamonds, which was estimated at 35.2 billion carats in 1989, remained virtually unchanged at 35.6 billion carats in 1990.

In Central Africa, efforts to expand production are continuing and recent tax changes and more vigorous controls have persuaded dealers to export more diamonds through official channels. Production, which had fallen in 1988, recovered to 447,700 carats and amounted to some 96,000 carats in the first quarter of 1990.

In Angola, illicit digging, theft and smuggling have continued to be a problem, but the industry has staged a very strong recovery since 1986, when production reached a low point of only 266,000 carats: in 1989 it totalled 1,316,000 carats. The objective of 1.6 million carats set for 1990 has not been met output falling to 1.2 million carats only.

In Sierra Leone, smuggling is an even more serious problem, as may be deduced from official statistics which report production falling from 141,000 carats in 1988 to only 48,000 carats in 1989, whereas it had been 349,000 carats in 1985.

In Botswana, the record production level of 15 million carats attained in 1988 is being maintained, though in 1990 export returns have been disappointing.

In Zaire, which produces mainly industrial diamonds, production reached 19.2 million carats in 1990 compared to 17.8 million carats in 1989, despite lower activity at the "comptoirs" which deal in private operations. Prices in Zaire slipped from the 1989 average of \$20.16 per carat to \$18.20 per carat in 1990.

6. Gold

The recovery in demand for gold in jewellery, electronic equipment and dentistry has made investment in gold mining more attractive, so that more than five new projects were started in developing Africa in 1990 and four others are planned to come on stream in 1991. Namibia, for example, has opened the Navachab gold mine which, when it reaches its full capacity, is expected to produce two tons of gold a year.

In Zimbabwe, Cluff Corporation is pursuing exploration activities to boost reserves in currently exploited mines and to find new deposits. In Ethiopia, a new gold mine at Lega Dembi is reported to be producing 3 tons of gold a year.

Reported output data, which are often incomplete, show that developing Africa produced 34.12 tons of gold in 1989 and that output is set to increase by 3.8 per cent in 1990 with the opening of new mines. Gold prices were not favourable in 1990. In particular, they did not rise as could have been expected in reaction to the Gulf crisis and the ensuing war. On the London market, prices averaged \$378.1 per ounce in 1990, 5.7 per cent lower than in 1989. Gold may be losing its traditional role as a store of wealth and its poor financial returns may have become a more important factor in investors' and speculators' decisions.

7. Iron ore

After years marked by imbalance, the market for iron ore returned in 1989 to a rough equilibrium between supply and demand. Regional production rose by an estimated 8.3 per cent to 32.5 million tons.

In Liberia, the closure of the Lamco mines in 1989 because of the exhaustion of the Mount Nimba reserves and the outbreak of civil war in 1990 caused a reduction. It then forced a complete cessation of all mining activities. Liberian production was around 13 million tons in 1989 and may have been less than a quarter of that amount in 1990.

In Mauritania, the second most important producer after Liberia, production increased in 1989 to 12.1 million tons from 9.8 million tons in the previous year.

The remaining producing countries in the region operate on a much lower scale. In Algeria, annual production is around 3 million tons, mainly for domestic transformation and use.

8. Manganese Ore

Regional production of manganese ore recovered in 1989 from the 1988 decline, spurred by continuing price increases and a weaker dollar. Production reached 2,833,000 tons, 14 per cent more than in 1988.

In Gabon, the leading African producer, output in 1989 rose to 2,501,000 tons; while in Ghana it rose by an impressive 44.7 per cent to 334,200 tons. In Morocco, production of 32,000 tons in 1989 represented an increase of 6.7 per cent.

On the basis of January-June results, a further increase in regional output was expected in 1990, with indications that production in Gabon might rise by 13 per cent. However, results for the whole year may prove to have been less, given the unrest which affected that country during the summer of 1990.

9. Nickel

Nickel prices per lb had shot up in 1988 to \$6.25 from only \$1.76 in 1986, only to start falling in 1989 with the beginning of the economic downturn in industrialized countries. Prices declined by 3.3 per cent on average in 1989 and by a massive 33.4 per cent in 1990, as the world recession took hold and demand for steel dropped sharply. They then stood at \$4.02 per lb.

In reaction to those movements in demand and prices, regional output fell by 6.1 per cent in 1989, with a sharp drop of 12 per cent in Botswana. Zimbabwe managed to avoid a reduction, though its production rose by only 1.8 per cent.

In 1990, there could well have been a further decline of regional production. Zimbabwe faced acute technical problems and output there was expected to decline by 9 per cent.

10. Phosphate Rock

82. Phosphate rock production in developing Africa amounted to 32.8 million tons in 1989, 16 per cent lower than in 1988. In Morocco, the world's largest producer, the industry had a difficult year in terms of both production and sales: production fell by 27.4 per cent, while exports dropped by 13 per cent to only 12.4 million tons. The latter was mainly due to a contract dispute with India and the Moroccan industry recovered in 1989.

In Tunisia, which produces a low-grade phosphate, output increased by 4.5 per cent in 1989 and by a further 3.2 per cent in 1990, when it reached 6.5 million tons. In Togo, production fell by 3.1 per cent in 1989 and a further fall of 32 per cent was anticipated for 1990, on the basis of results in the first half of the year.

Prices were stable in dollar terms at \$40.5 a ton, but the slide of the dollar against other major currencies significantly reduced export revenues. Togo was particularly affected since its currency, the CFA franc, was one which appreciated against the dollar.

11. Tin

In 1989, regional production of tin remained stable at 5,000 tons, despite percentage declines in Zaire and Zimbabwe of 15.7 and 1.5, respectively. In 1990, Zaire was also seriously affected by a mine accident — the collapse of the tin mine operated by the Sominki Corporation. In Nigeria, production fell from 238 tons in 1988 to 147 tons in 1989 and 97 tons in 1990.

Over-supply by China and Brazil and high stocks in the face of modest demand combined to depress spot prices below the target of the Association of Tin Producer Countries (ATPC). In reaction, ATPC decided at its meeting in Cochabamba (Bolivia) in 1990 to cut export quotas for 1991.

D. Outlook for 1991

Mining is a key sector of the region's economy, creating downstream industries based on indigenous commodities that are used in the production of intermediate and final goods for domestic sale and for export. It therefore deserves high consideration, if the region is to benefit fully from its resources. It also requires large investments, however, which would change the structure of the national economies of the countries concerned. In the short term, moreover, external demand remains the determinant factor for

the mining industries.

In view of the recession in industrial countries and granted that a recovery was generally considered unlikely before the end of the year, demand for metals and other ores was expected to be depressed in 1991. The implication was that the fall in mineral prices recorded in 1990 would be repeated in 1991. As a matter of fact, IMF in its World Economic Outlook, October 1990, expected a fall of 10.8 per cent in the prices of minerals and metals during 1991, but OECD was more sanguine and expected a recovery of 2.3 per cent coming after a fall of 11.5 per cent in 1990. For some commodities, such as aluminium and iron ore, the prospects appear good, but the overall trend is for lower production in 1991.

An additional factor is the growing interest shown by West European countries in the mining potential of Eastern Europe. Conditions there are more favourable than in Africa, in terms of proximity, labour skills and the like. Africa could be "relegated to the back-burner".

For oil, the outlook is rather cloudy. Before January 1991, the accepted wisdom had been that oil prices would average \$25-\$26 a barrel on condition that military operations were short-lived and did not result in serious damage to oil installations in the Gulf. In the event, oil prices started to fall in January 1991, before the outbreak of war. When the war finally started, the slide continued and, on the basis of information in the months which followed, it seemed that prices could well average \$18 a barrel for the year. The supply shortfall which was feared in 1990 has been made up by increasing production, particularly in Saudi Arabia, and it was not clear whether OPEC would reintroduce quotas in the near future. While oil demand would fall slightly worldwide, particularly in the OECD member countries, world output would most probably increase and African countries would share in the upturn. Lower prices would mean that the large revenues earned in the second half of 1990 would not be forthcoming in 1991.

IX. MANUFACTURING INDUSTRY

A. Introduction

Industrialization in the countries of developing Africa during the first years of their independence evolved along two main lines: the processing of domestic raw materials by means of relatively simple technology for export markets; and import substitution by producing basic consumer goods, largely for the domestic market. With some exceptions, that pattern of industrial development was more or less consistently pursued in the 1960s and 1970s by most Governments. The import-substitution enterprises, as infant industries, were protected from international competition in the domestic market but at the same time they relied heavily on external sources for raw materials, spare parts and other essential inputs. That state of affairs and other flaws in those earlier industrial strategies and policies had telling consequences for the growth of the industrial sector in the 1980s.

The disappointing results of the 1960s and the 1970s, led to the adoption of a new strategy in the framework of the first United Nations Industrial Development Decade for Africa 1980-1990 (IDDA¹¹). The IDDA programme sought to address the structural weaknesses which had stifled progress in the manufacturing sector. In addition to giving a high priority to the rehabilitation of existing industries, the programme emphasized the development of core industries (engineering, metallurgical, chemical, etc.) and of small and medium-scale enterprises for which the domestic resource configuration showed a comparative advantage. But the objectives of IDDA were not attained. Instead, during the 1980s there was a shift of direction in government policies in response to the acute and persistent internal and external imbalances which ultimately culminated in what is now called the African economic crisis.

At the end of the 1980s, the manufacturing industry sector still predominantly consisted of light industries producing consumer goods; and agro-based industries accounted for a substantial share of sectoral output. Except for food processing, the sector remained highly import-intensive. According to a survey of industries in the region by the United Nations Industrial

Development Organization (UNIDO)¹², if products of agro-based industries and textiles — which had an import content below 25 per cent — were excluded, 55 of the 100 or so products manufactured in the 40 countries involved had an import content of close to 100 per cent.

The high import content inevitably led to underutilization of capacity when, as occurred in the 1980s, countries experienced difficulties with the balance of payments. In particular, when debt-servicing rose to a third or more of external receipts, insufficient resources remained to import the necessary industrial inputs. Capacity utilization fell to only 30-40 per cent in most countries of the region during the 1980s. In the framework of the structural adjustment and reform policies latterly adopted by most Governments, the emphasis has been on the rehabilitation of existing capacity and on fundamental changes in the management of the industrial sector. Not only were public enterprises to be managed according to free-market principles, but many if not the majority were to be privatized or closed if they could not be operated profitably. In view of the low productivity of past investment in manufacturing, the creation of new capacity was given a lower priority than streamlining the sector and making the best use of existing structures.

B. The Performance of Manufacturing Industry, 1989-1990

The relative failure of industrialization policy in the last two decades is reflected in the low contribution of manufacturing industry to regional output: only 10-11 per cent in 1990, according to the estimates available — a proportion roughly unchanged since the beginning of the 1980s. The annual growth of manufacturing value added (MVA) averaged 3 per cent in 1980-1989, whereas the IDDA strategy had set as targets an average of 5 per cent for the first decade and 8 per cent for the second.

The factors accounting for most of the changes in the growth pattern of manufacturing in the 1980s were:

11 General Assembly resolution 35/66B.

12 UNIDO, Industry and Development, Global Report 1990/91, (Vienna, 1990).

weather conditions, which affected agricultural output, the key source of raw material inputs into the agro-industries; scarcity of foreign exchange to import essential inputs; ageing equipment; and the lack of new investment. In 1988 and 1999, conditions did not change fundamentally in those respects. As shown in table IX.1 below, after growing by 3.3 per cent in 1988, manufacturing industry grew by 2.9 per cent in 1989. The rate fell further to only 1.6 per cent in 1990 because of the poor agricultural season and the effects of the oil shock which followed Iraq's invasion of Kuwait in August 1990. Oil-importing countries, faced with a suddenly inflated bill for oil, had to cut back — or not to increase — imports of industrial supplies. On the other hand, in the oil-exporting countries, industry was subject to severe structural constraints which made it impossible to take advantage of the oil windfall by increasing output rapidly.

cost of ££422.3 million and investment capital of ££349.5 million, which were expected to create 2,000 new jobs with a payroll of ££11 million in annual wages. The Government planned to establish nine industrial free zones to encourage investors and create jobs. It set aside about \$37 million for establishing the infrastructure of those zones.

In another development, the five members of the Arab Maghreb Union (AMU) (Algeria, Libya, Mauritania, Morocco and Tunisia) drew up plans for a free trade zone, to become effective by the end of 1992, followed by a customs union by the end of 1995. The overall objective is to establish a North African Common Market by the year 2000.

In West Africa, MVA averaged 4.1 per cent of GDP in 1989-1990 (3.2 per cent in 1989 and 5.2 per cent in 1990). As usual, the results for the subregion were

Table IX.1
Indicators of manufacturing industry performance in developing Africa
(in percentage)

	Share of Manufacturing in GDP (1980 prices) per cent a/			GDP growth rates (1980 prices) per cent			MVA growth rates (1980 prices) per cent		
	1988	1989	1990	1988	1989	1990	1988	1989	1990
Central Africa	8.1	8.2	7.9	-1.2	0.2	-1.8	-1.8	1.2	-1.2
East and Southern Africa	12.3	12.6	12.2	5.0	3.5	1.1	5.1	6.3	-2.2
North Africa	11.1	11.4	11.2	1.0	2.7	3.2	3.0	1.5	1.2
West Africa	9.3	9.1	9.2	2.9	5.5	3.6	4.0	3.2	5.2
LDCs b/	8.6	8.5	8.5	3.5	5.2	-0.3	-2.6	2.0	-2.0
Oil-exporting	9.9	9.9	9.7	0.7	3.7	4.0	2.9	3.0	2.5
Non-oil exporting	11.8	11.7	11.6	5.0	2.3	1.6	3.7	2.0	0.4
Africa	10.6	10.6	10.4	2.0	3.6	2.9	3.3	2.9	1.6

Source: ECA Secretariat
a/ Preliminary estimates
b/ Excluding Liberia

The North African subregion, with an average MVA share in GDP of 12.4 per cent in 1989-1990, recorded MVA growth of 1.5 per cent in 1989 and 1.2 per cent in 1990, compared with 3 per cent in 1988. A turn-round is expected to start in 1991, but it will depend mainly on the success of current reforms. Other factors, such as the level of oil prices, the extent of private foreign direct investment and the scope for access to the European single market, which EEC is due to bring into effect in 1992, will also play an important part.

Egypt made significant progress in promoting investment: the newly created Investment Authority approved by the middle of 1991 projects with a total

greatly influenced by those in Nigeria, where the manufacturing sector has strongly recovered since 1987. In 1988-1990, Nigeria recorded MVA growth averaging 6 per cent per annum, while the proportion of local raw materials used in manufacturing was reported to have increased from 30 per cent in 1986 to 50 per cent in 1990. The Nigerian manufacturing sector remained structurally weak, however: capacity utilization increased only modestly, from 33 per cent in 1989 to around 40 per cent in 1990. The sector also experienced falling employment and cuts in private domestic investment because of high interest rates and foreign exchange scarcity. The consequence of low investment is an ageing capital stock. According

to a recent survey¹³, about 75 per cent of the equipment in the manufacturing sector was between 10 and 20 years old; 15 per cent was more than 20 years old; and only 10 per cent had been installed within the past 7 years. New direct foreign investment remained negligible in spite of privatization. One of the few large public investments to be initiated in recent times is the first aluminium smelter in the country, estimated to cost \$1.6 billion.

Another significant contributor to subregional MVA was Senegal, where the overall level of industrial activity is largely influenced by the processing of agricultural output, particularly that of oil seeds, which carries a weighting of 12 per cent in the index of industrial production. On account of the effect of bad weather conditions on agricultural output, MVA declined by 8.3 per cent in 1989 but partially recovered (6 per cent growth) in 1990 — and a further increase of 6.1 per cent was expected in 1991. The manufacturing sector has been under considerable pressure, however, since a structural adjustment programme entered into operation in 1985-1986. The lowering of trade barriers exposed the sector to cheap imports from Asia and elsewhere, forcing in some cases the closure of long-established industrial firms and substantial loss of jobs.

Of all the subregions, Central Africa had the lowest ratio of MVA to GDP in 1988-1990, an average of 8 per cent. The performance of the sector has been very poor in recent years, mainly on account of political factors. Overall, while subregional MVA had grown at a modest 1.2 per cent in 1989, it was expected to contract by 1.2 per cent in 1990.

In Zaire, the sector stagnated during 1988-1990 because of supply shortages, ageing equipment and limited credit facilities. The economy-wide crisis in that country sharply reduced demand, even in the hitherto dynamic food and beverages industries. Political turmoil further clouded prospects in 1991. In the Central African Republic, industrial activity stagnated in 1990, following robust growth of 22 per cent in 1989. That outcome was due partly to social unrest and transport difficulties. Falls in turnover were reported of 6.7 per cent in the textile industry, 12.5 per cent in chemicals and 16.6 per cent in engineering.

In the framework of the Preferential Trade Area for Eastern and Southern African States (PTA), that subregion made headway in the establishment of multinational enterprises, a cornerstone of PTA industrial strategy. The first such industrial enterprise,

a triple-superphosphate plant, is at an advanced planning stage. It will be located in Uganda and the estimated cost of the project is \$121 million, of which the national Government will provide \$21 million. A single-superphosphate plant is planned for Burundi. Since pharmaceutical requirements in the subregion have an estimated value of \$500 million per annum, of which less than 10 per cent can be met by local manufacturers, the PTA secretariat is encouraging the establishment of four or five specialized manufacturing plants to supply the subregional market, plants which will receive substantial technical and financial support in specific product lines.

The growth of MVA in East and southern Africa, which had been 5.1 per cent in 1988, rose to 6.3 per cent in 1989, making for a 5.7 per cent average. Estimates for 1990 showed a sharp down-turn to -2.2 per cent, due probably to an unfavourable agricultural season. A modest recovery to 1.5 per cent was forecast for 1991. Civil strife in the subregion greatly affected industrial activity in Ethiopia, Mozambique and Somalia, so that there may well have been a further decline of MVA in 1991.

The relatively more advanced countries industrially had mixed results in 1989-1990. Zimbabwe posted an impressive growth of 7.8 per cent in 1989 and 3 per cent in 1990. In Zambia, on the other hand, MVA declined by 0.3 per cent in 1989 and 1.5 per cent in 1990. With copper mining in decline, the consequent acute foreign exchange shortages caused utilization of manufacturing capacity to fall substantially. To attract foreign private investment, the Zambian Government decided to establish three duty-free zones to which a wide range of attractive investment incentives would be attached.

Angola established an office for foreign investment in 1990 and ten industrial projects, worth more than \$35 million, have already been approved.

C. The Performance of Main Sub-sectors, 1989-1990

1. Agro-based Industries

(a) Food, beverages and tobacco

In the 1980s, the growth of the food, beverages and tobacco industries in most African countries was not encouraging. Agriculture itself performed disappointingly, so that the supply of the main inputs

13 The Economist Intelligence Unit, *Nigeria Country Profile 1989-90* (London, 1989)

was subject to substantial fluctuations and fell short of requirements. Enterprises, like those in other sub-sectors, suffered from poor management, poor plant design, the shortage of foreign exchange, etc. Some countries, however, recorded positive achievements in 1989-1990. For example: output grew by 5 per cent in Tunisia in 1989; and Moroccan exports of food, beverages and tobacco increased by 8 per cent in 1989-1990, an indication that output had attained levels which enabled the sub-sector both to satisfy domestic demand and to export.

Among the new investments, in July 1989 the Grands Moulins Burkinabe (GMB) in Burkina Faso built a unit for the milling of maize, sorghum and millet. The objective was to expand production in the brewing and baking industries while bringing about a substantial reduction in imports of malt and wheat. In Nigeria, where the importation of wheat had been banned since 1987, intensive work during 1989-1990 to develop composite flours for milling local wheat, maize, sorghum, millet and fonio were crowned with success.

In the vegetable oils sub-sector, programmes were launched during 1989-1990 in Cameroon and Nigeria to improve the efficiency of traditional palm-oil extraction techniques. As a result, improved presses are currently manufactured in Nigeria by local engineering workshops. In the modern sector, a new palm-oil refinery came into operation in Cameroon in early 1990, reducing reliance on imported cooking oils, for which annual domestic demand in 1989-1990 was estimated at 45,000 tons per annum. Until 1989, 40 per cent of the country's palm oil production, estimated at 100,000 tons per annum, was exported in raw form, with considerable loss of the potential higher revenue which export of the refined product would yield. A project is currently in course of implementation to set up an enterprise which would process 40,500 tons of palm oil per annum, with output targets of 14,500 tons of refined cooking oil, 2,400 tons of margarine and 700 tons of fatty acids.

(b) Textiles

In a number countries, such as Chad, Mali, Mauritius, Nigeria, Uganda and the United Republic of Tanzania, the textiles and clothing industries are very important sub-sectors of manufacturing industry. Mauritius, where foreign investors from Hong Kong, India, South Africa and elsewhere have invested heavily, has a vertically integrated textile industry which imports raw cotton and exports clothing. The country is the third largest world producer of knitted goods, exporting more than 10 million pieces a year. About 50 enterprises operate in the textile industry. The largest knitwear manufacturers and their annual piece production are: the Afasia group, 4 million; Crystal, 4

million; Summit, 2.5 million; Poullee Textile, 1.2 million; Bonair Knitwear and Tara Knitwear, about 1 million each.

In Tunisia, the textile sub-sector accounts for 30 per cent of exports. There are 1,500 manufacturers, 500 of whom produce for export, the bulk of which — about 60 per cent — consists of ready-to-wear and knitted goods. Half the manufacturing labour force of 30,000 workers is employed on textiles.

In Nigeria, too, the textile industry is one of the largest, producing an estimated 500 million metres of cloth per annum. The abolition in 1990, as part of the structural adjustment programme (SAP) 1986-1989, of the import licensing system helped the industry, which depends on imports for such inputs as chemical dyestuffs, as well as spare parts for machinery. Nevertheless, the capacity utilization of the sub-sector has been estimated at only 60 per cent. The depreciation of the naira since the inception in September 1986 of the second tier foreign exchange market opened up new export opportunities and possibly an avenue for better utilization of capacity. The largest company, United Nigeria Textiles, exports up to 2 million metres of grey cloth and 400 million printed textiles each year.

The most dynamic sub-sector of manufacturing in the United Republic of Tanzania is also textiles. The National Textile Corporation (TEXCO) obtained a \$7 million loan from the OPEC fund for use on maintenance work and to purchase inputs for subsidiary companies, as part of a comprehensive project for the rehabilitation of the public-sector enterprise of which TEXCO is the holding company.

2. Metallurgical Industries

Iron and steel

The 69 iron and steel plants operating in developing Africa have a total installed annual production capacity of 8.5 million tons of iron, 10.5 million tons of crude steel and 11.1 million tons of rolled products. Steel production in 1988 was 4.6 million tons, less than 0.6 per cent of the world total. The most significant recent developments in the industry took place in Algeria, Egypt and Nigeria. The Algerian enterprise ENSIDER manages the El Hadjar steel complex. The plant, located at Annaba, has an installed capacity of 2.2 million tons and employs 18,000 workers. The complex includes 35 associated production facilities and is linked to enterprises which produce cookers, refrigerators, car bodies, metal boxes, etc. Production in 1987 was 1.5 million tons. A second steel mill is planned for Bellara, near El Milia, but no firm decision had been taken by early 1991.

The Egyptian Metallurgical Industries Corporation has been implementing several expansion projects in the steel sub-sector with the objective of achieving self-sufficiency in constructional steel. The country's steel deficit was reduced from 2 million tons in 1985 to 0.4 million tons in 1989 due to increased output from the new Alexandria National Iron and Steel Plant (ANSDK). National output reached 1.4 million tons of steel in 1989, including 932,000 tons by ANSDK, its MIDREX process¹⁴, at a record-breaking 133 per cent of the plant's rated capacity. The company is a joint venture between the Egyptian Government and the two Japanese firms NKK, Kobe and Toyo Menka. The plant has received government authorization to sell 60 per cent of its output for dollars and annually exports 90,000 tons to EEC.

In the Libyan Arab Jamahiriya, the Misurata integrated iron and steel complex, based on direct reduction and with an installed capacity of 1.2 million tons of crude steel, began operations in 1989.

The steel industry is at the heart of Nigeria's plans for broad-based industrial development, a springboard from which to develop fully integrated automobile and construction sectors of industry. After the expenditure of billions of dollars, the Delta Steel direct reduction plant, with an annual capacity of 1 million tons of billets and rolled products, was operating in 1990 at 15 per cent only of its rated capacity, never having operated above the 30 per cent mark since its establishment. The Ajaokuta Plant, with a planned capacity of 1.2 million tons a year, has already cost \$4 billion and is not yet complete. The Government has committed itself, however, to completing the project by 1992. A number of units have been commissioned, including the thermal power plant, a centre for machine tools manufacture, repair and maintenance, an ore mine and the Itapke-Ajaokuta rail line for ore transport. The outstanding units are: the blast furnace, coke ovens, tie-ins and the Ajaokuta-Warri rail line.

In Zimbabwe, the ongoing rehabilitation programme for ZISCOSTEEL has now reached an advanced stage.

D. Industrial Policies

The failure of industrialization in most African countries since independence has clearly been due to the inappropriate policies followed and to the mismanagement of the enterprises which were created. One of the symptoms of failure has been the generally very low rates of capacity utilization achieved

in the region. Plant capacities were initially overestimated; the technology selected was ill adapted to actual economic conditions; and management was very poor, with sometimes grotesque levels of overmanning and a widespread lack of preventive maintenance. In the public sector, which accounts for the greater part of manufacturing industry, plants managed through government ministries lacked flexibility to adapt to changing circumstances; and their selling prices sometimes failed to cover their production costs. That was especially damaging in times of rapid inflation and currency depreciation, when the cost of inputs was rising rapidly.

Capacity utilization rates of 35 per cent or less meant that the capital invested was largely wasted. In those circumstances, it would not have been a reasonable economic decision to invest in the creation of additional capacity. That is why the structural adjustment and economic reform programmes currently adopted by a majority of African developing countries give priority to improving the way the manufacturing sector is managed, in order to maximize the utilization of existing capacity. One way of improving management is to introduce market principles in the public sector. Privatization has therefore become a key element of industrial policy in the region.

The ways to privatize are, of course, varied — from selling off industrial units and enterprises to negotiating management contracts and leasing, separately or in combination. In Algeria, for example, where the public sector accounted for 85 per cent of MVA, the solution was, in a first stage, to break up industrial enterprises into smaller, manageable units and, in a second stage, to detach enterprises from ministerial control, give them wide management autonomy and corresponding structures, and vest their capital in financial holding companies. Not only do enterprises now possess full powers to determine their prices, but they can also manage their own financial affairs, even with respect to selling in foreign markets. The liberalization of the Algerian public sector is incomplete, some enterprises deemed to be "strategic" remaining under central control.

In Egypt, a recent law granted more autonomy to enterprises in the public sector, the intention being to foster a private-sector style of management, but to do so gradually in order to minimize disruption and social problems. Ultimately, a unified investment law would be enacted for application to public and private sectors

14 Licenced by the MIDREX company, which has pioneered a pollution-free process of steel manufacture with the use of natural gas instead of coal.

alike. The outlines of the new management rules for the public sector are already clear:

- (a) The enterprises will be taken out of the State budget and given the freedom to finance their own investments;
- (b) Management through ministries will be ended and there will be a single ministry responsible for overall review of the public sector.

In Cameroon, the reform of the public sector included, alongside privatization, the use of performance contracts between the State and public-sector enterprises. Such contracts made state support conditional on the attainment of specific targets by the enterprises, in return for greater management autonomy. In addition, the revised investment code included fiscal incentives that would be granted on the basis of a set of performance criteria, which would include the magnitude of value added, job creation, training and exports. Such incentives would be granted for a limited period on a diminishing scale and could not be renewed thereafter. Remission of import duties would be granted for a very limited period, likewise with no possibility of renewal, and would be applicable only to essential industrial capital equipment imported during the initial stages of investment.

Another important element of present industrial policy is the rehabilitation of existing plants which are unable to operate at a profit because of lack of maintenance, poor initial design and/or ageing equipment. The Government of the United Republic of Tanzania launched a trade adjustment and industrial rehabilitation programme in 1986 which resulted in an impressive increase in the utilization of manufacturing capacity. The rate had been only 25 per cent in 1984 and in 1989 it reached 40 per cent. Improvement is already visible in the industries manufacturing tires, cement, paper, aluminium, soap and detergents. The Government is preparing detailed action plans for the textiles, leather, shoes and agro-industries sub-sectors, which utilize mainly domestic inputs and account for a third of MVA. Those sub-sectors presently operate at less than 30 per cent of capacity.

Since 1989, the Government of Togo has proposed the privatization of 40 public enterprises and has liquidated eight of them, for which it netted 8 billion CFA francs (\$129 million). It privatized a further 18 under risk-sharing arrangements, sold off five, leased five and concluded joint-venture arrangements for two. By the beginning of 1991, 30 public enterprises had been either sold, liquidated or given to private management.

In Nigeria, under a programme launched in 1988, 100 enterprises were due for partial or full privatization. By the end of 1990, 71 had been processed. The

Government also offered for management buy-out the national cargo-handling company, which had been set up 19 years previously by an investment of some 7 billion naira of public funds. The proceeds from sale of 54 privatized enterprises were N278 million and a further 24 to be sold on the market are expected to raise that total to N1 billion. Under another programme, the Government plans to commercialize 32 parastatal companies: 23 of them partially so — including the Nigeria Railways Corporation (NRC), the National Electric Power Authority (NEPA) and Delta Steel — and the remaining nine fully — including the National Petroleum Corporation and Nigerian Telecommunications (Nitel).

The Senegalese Government, in the framework of its 1989-1992 adjustment programme, earmarked in 1989 30 public parastatals for privatization, five of which have already been sold off. The latter enterprises, however, were already heavily dependent on external sources of capital and management.

The Tunisian scheme in the framework of the adjustment programmed started in 1986 stipulated that 10 per cent of the equity of enterprises to be privatized should be reserved for employees of the enterprises in question; 70 per cent offered to Tunisian nationals generally by public sale; and 20 per cent earmarked for foreign investors.

A large-scale privatization programme launched in the Sudan in 1990 included Sudan Airways, Sudan Shipping Line, banks, hotels and tanneries. At the end of July 1991, Sudan Commercial Bank, Abu Niama Jute Factory, and Khartoum and Blue Nile Factories were put up for sale.

Despite the foregoing initiatives by various Governments, privatization is faced with a difficult investment environment. The financial institutional structures are weak, the capital markets are ill developed, the indigenous entrepreneurial class lacks the requisite resources — technological, management and organizational skills etc. — to own and successfully operate some of the enterprises put up for privatization. Moreover, the timing is not propitious: outside Africa, direct investment in the region is declining rapidly and private investors sense that growing opportunities are offered by a single EC market in 1992 and the opening up of Eastern Europe.

A policy of structural adjustment, however, includes other measures, such as the lowering of trade barriers and the reduction of manpower (where clearly redundant), which bring other problems in their train: those measures have, of course, painful consequences. In some instances, local production has been overwhelmed by cheap imports and even contraband

goods. Domestic production of textiles and clothing has even had to compete with imports of used clothing in very unfavourable conditions. That has been particularly damaging in countries such as Cameroon, Côte d'Ivoire and Senegal, where local production is put at a disadvantage by the high exchange rate of the CFA franc compared to the mainly inconvertible currencies of neighbouring countries. Unemployment, therefore, has been an unintended consequence of reform policy, necessitating specific measures by Governments to mitigate its effects. That is the context in which the Togo Government set out to establish an industrial free zone in the expectation that it would create jobs. The country has a serious problem in the wake of the restructuring of the public sector, in that urban unemployment attained 16 per cent in 1989.

It can be said that the objectives of the first IDDA were not met partly because they were too ambitious, given the real state of affairs in the countries of the region. Another factor, however, was that many Governments did not even start to implement the declared strategy. For example, most countries did not set up national focal points or coordinating committees, as laid down in the IDDA strategy. No country drew up an investment portfolio of core or priority industries, no country mobilized or allocated funds specifically for industrial development in the IDDA context. Moreover, the IDDA strategy itself paid inadequate attention to investment requirements and failed to provide for cost estimates; it also grossly underestimated the resources which would have to be deployed for the implementation of its programmes, in the shape of industrial entrepreneurs, industrial managers, high-level professionals, middle-level specialists and supervisors etc.

The second Industrial Development Decade for Africa (IDDA II) was proclaimed by the General Assembly in its resolution 44/337 of 22 December 1989. The preparation of the national, subregional and regional programmes which it proclaimed took into account the lessons of the first IDDA. Five cardinal principles inspired its strategy:

- (a) Human-centred orientation of the industrialization process;
- (b) Industrial development from the grass roots;
- (c) Choice of appropriate market strategy;
- (d) A realistic rehabilitation strategy; and
- (e) Regional co-operation and integration.

The programme laid down for IDDA II was endorsed by the Conference of African Ministers of Industry at its tenth meeting, held at Dakar (Senegal) in July 1991. That programme recognized the critical role of agriculture and emphasized the need to strengthen the linkages between the agricultural and industrial sectors.

It focused on industrial rehabilitation and the revitalization of public enterprises. It aimed to promote African private entrepreneurship and to support the informal and the small- and medium-scale sectors. It emphasized the role of markets for industrial products, attaching particular weight to economic integration at the subregional and regional levels.

Nevertheless, funding remains a major problem. Most African countries face daunting financial difficulties and over 30 of them are committed to structural adjustment and reform programmes which do not allow much scope to be given to supplementary industrial investment, at least up to the mid-1990s. Moreover, prospects for securing more external resources to implement IDDA II are not bright at a time when the volume of such flows is declining, not to speak of the claims on available resources of other regions of the world. In those circumstances, a firm commitment by African countries to IDDA II is fundamental: otherwise its programme will run the risk of remaining a catalogue of "pious wishes".

E. Prospects

The prospects for industrial development in the region in the immediate future are not encouraging. The ECA secretariat had forecast a recovery in 1991, in which manufacturing output would grow by 3.8 per cent, compared to only 1.6 per cent in 1990. That assessment greatly depended on a good performance in North Africa and West Africa, since it assumed that manufacturing would remain depressed in the other subregions. Subsequent returns from some countries in 1991 suggested that the forecast might prove to have been too optimistic. In any case, the reforms currently in course of implementation will take time to produce their full effects and enterprises have not yet fully adapted to their new environment. Once the changes are "internalized", so to speak, manufacturing industry should stage a strong recovery and a major factor to propel the rapid development of the sector will have been created. To make industrialization a success, however, African countries ought to tackle the problems posed by a low availability of skilled labour and small markets.

Real, tangible progress in regional co-operation through the removal of obstacles to mutual trade is a necessary condition for any sustained industrialization effort. That is not to suggest that Governments should aim at a utopian goal: in present conditions, no country in the region is able to develop on its own a diversified and fully integrated manufacturing sector. Obviously, therefore, it is only through co-operation among countries that progress in manufacturing industry can be achieved — i.e., by concerted action over a larger geographical area. Government and

peoples need therefore to accept complementarity and even interdependence if they want to succeed. In that way, they will make a practical commitment during the

1990s to national and regional industrial development in the context of the second IDDA.

X. TRANSPORT AND COMMUNICATIONS

A. Introduction

Transport and communications, like other sectors of the economy in developing Africa, have been adversely affected by the crisis of the 1980s. In some countries, at the least, the build-up of the infrastructure was considerably slowed down; in other countries, there was a severe deterioration which amounted to a net loss of capital, even in comparison with what had been inherited from colonial times. In addition, some kinds of traffic flow contracted or stagnated, the stock of transport vehicles aged and the region was unable to keep pace with technological developments in communications.

The sectoral crisis reinforced the general economic crisis: production was below potential for lack of sufficient transport to bring goods to markets and business opportunities were lost because of deficient communications systems.

Available data indicate that transport and communications account for around 6 per cent of Gross Domestic Product (GDP) in developing Africa as a whole. During the period 1980-1989 the sector grew at an average annual rate of less than 2 per cent — slightly faster, however, than GDP.

The programme of the United Nations Transport and Communication Decade for Africa, 1978-1988 (UNTACDA) was undertaken to establish an integrated transport and

communications system and thus reverse the trends commented upon above. UNTACDA has been successful: it made a significant impact on transport and communications in the region but not a large enough one to prove decisive as yet. While African Governments assured the allocation to the infrastructure of a relatively high proportion of total investment, that total has been shrinking and therefore the investment has fallen short of the resources needed.

B. Road Transport

Road infrastructure has not fundamentally improved since the early 1980s. The most recent data indicate a total length of roads in the region of 1.4 million km, equivalent to a density per square kilometre of around 0.048 km. In 1981, it had been 0.060. The density figures are difficult to interpret because a large part of the continent is constituted by uninhabited deserts. In Egypt, for example, the population is concentrated along the Nile, the remainder of the country being virtually empty and bereft of roads. However, even if that factor is taken into account, the road density is not only extremely low but also a fraction of the density in other developing regions: in China it was 0.49 km per sq km in 1980 and in India 0.46 km per sq km in 1981.

Because of the lack of data for some countries, it is better to base comparisons on the group of countries for which data are available over the whole period 1981-1988. As can be ascertained from table X.1 below, in those selected countries the length of roads totalled 1.05 million km in 1988, an apparent increase in the network of some 177,632 km — 16.8 per cent — since 1981. That is equivalent to an average annual growth of less than 2 per cent. Road density in km per sq km rose accordingly from 0.05 in 1981 to 0.056 in 1988. Even the network growth was in a sense illusory, because a third of it came from the increase in the United Republic of Tanzania from 53,600 km in 1984 to 85,500 km in 1988, of which 62,000 km consisted of unpaved rural roads. The composition of the network in that country became, therefore, markedly different from that reported in earlier years.

Moreover, in many countries a significant proportion of the roads included in the statistics are impassable or have practically ceased to exist. In Zaire, though official statistics reported 145,000 km of roads, half of them were in a state of extreme deterioration. Furthermore, less than 20 per cent of the 2,800 km of paved roads were in good condition. A similar situation obtained in countries such as Angola and Mozambique, which have been affected by civil strife since obtaining their independence, or in others where road maintenance has been neglected for other reasons during the two last decades.

Table X.1
Length and density of the regional road network by subregion and in selected countries: 1981, 1984 and 1988

	Length			Density		
	Kilometers					
	1981	1984	1988	1981	1984	1988
North Africa	191480	263271	214364	0.028	0.039	0.025
Algeria	72091	78190	87376	0.03	0.033	0.037
Egypt	28010	30089	28725	0.029	0.03	0.029
Morocco	58666	57692	59188	0.083	0.081	0.083
Sudan	9018	19110	20000	0.004	0.008	0.008
Tunisia	23695	78190	19075	0.144	0.476	0.116
West Africa	229584	299592	319398	0.067	0.049	0.052
Benin	7445	7500	7500	..	0.067	0.067
Gambia	3083	2388	2390	0.28	0.217	0.217
Ghana	32000	28400	31689	0.134	0.119	0.133
Cote d'Ivoire	12200	47880	45200	0.038	0.148	0.14
Liberia	5412	7560	7580	0.049	0.068	0.068
Mali	12860	13500	13500	..	0.011	0.011
Niger	19000	19000	19000	0.015	0.015	0.015
Nigeria	107990	108000	117900	0.117	0.117	0.128
Senegal	13930	11700	14015	0.071	0.059	0.071
Togo	7000	7000	7000	0.124	0.124	0.124
Burkina Faso	8664	11200	13117	0.032	0.041	0.048
Central Africa	98148	102905	106123	0.176	0.071	0.045
Burundi	5144	5400	6288	0.185	0.194	0.226
Central African Republic	22560	22600	23700	0.036	0.036	0.038
Rwanda	6719	10000	12385	0.255	0.38	0.47
Cameroon	63725	64905	63750	0.134	0.137	0.134
East and Southern Africa	358234	374390	415193	0.06	0.07	0.07
Botswana	8026	13000	19204	0.014	0.022	0.033
Djibouti	2795	2800	2800	0.127	0.127	0.127
Ethiopia	35459	43200	35000	0.029	0.035	0.029
Kenya	53588	55000	55000	0.092	0.094	0.094
Lesotho	4010	4000	4000	0.132	0.132	0.132
Madagascar	50620	50000	50000	0.086	0.084	0.084
Malawi	10772	13280	11651	0.091	0.113	0.099
Mauritius	1782	2795	1800	1.55	2.43	1.565
Seychelles	222	257	259	0.555	0.643	0.648
Somalia	21297	21600	21600	0.033	0.034	0.034
Swaziland	2717	2821	2821	0.156	0.162	0.162
Uganda	27544	27037	27037	0.117	0.115	0.115
United Republic of Tanzania	53613	53600	85500	0.057	0.057	0.09
Zimbabwe	85789	85000	98521	0.219	0.217	0.252

Source: ECA Secretariat.

As the table shows, the length of paved roads represented only 17.3 per cent of the network total for the whole of developing Africa. Only in North Africa did the proportion come close to half (45.5 per cent), exceeding that level in Egypt and the Libyan Arab Jamahiriya. The picture is made worse when the

condition of the network is brought into account: it was described as good for only half the paved roads and for only 20 per cent of the unpaved roads.

The table makes it evident that the status of the road network is quite different from one subregion to

Table X.2
Length and condition of road network by subregion, 1988

Subregion	Length in km				Conditions (per cent)					
	Total length	Paved	Unpaved	Rural unpaved	Unpaved roads			Paved roads		
					Good	Fair	Poor	Good	Fair	Poor
North Africa	239964	109137	63714	67113	44	39	17	10	17	73
East and Southern Africa	560716	61746	191847	307123	49	36	15	38	31	31
Central Africa	283990	9182	118178	156630	37	25	38	35	33	32
West Africa	319373	62352	92007	165019	58	17	26	11	31	58
Africa	1404048	242417	465746	695885	50	30	20	20	25	55

Source: ECA Secretariat.

another and table X.3 below demonstrates that it also varies considerably from country to country within the subregions. Undoubtedly the North African region is the most advanced, though that is not reflected in density statistics because of its large tracts of desert land. In fact, the road density in Tunisia is more than twice the regional average. The extent of the disparities poses a major problem in devising and extending the inter-country network, which now approximates 140,000 km. That network crosses the region in the North-South and East-West directions. It includes the Trans-African Highway System, which is the basic

element in the physical integration of the continent. On some sections, the condition of the Highway is poor: in North Africa, while Mauritania's roads have deteriorated, the network in the remaining countries is in a satisfactory state; in Central Africa, because of heavy rainfall and dense vegetation, a great part of the Highway is not usable for motor traffic all the year round; in West Africa, 80 per cent of the Highway is bitumenized and all the national capitals are connected via the Highway, though problems of infrastructure and facilitation remain.

Table X.3
Road network lengths by country and category: developing Africa, December 1988*

	Total Network	Main Network			Secondary and Tertiary roads
		Total	Paved	Unpaved	Unpaved
North Africa					
Algeria	87376	46611	38983	7628	40/65
Egypt	28725	16367	15081	1286	12358
Sudan	20000	8184	2335	5849	11816
Morocco	59188	59184	28553	30631	4
Libyan Arab Jamahiriya	25600	25600	14500	11100	..
Tunisia	19075	16905	9685	7220	2170
West Africa					
Benin	7500	3434	1038	2396	4066
Burkina faso	13117	8739	1506	7233	4378
Cape Verde					
Cote d'Ivoire	45200	14976	3976	1000	30224
Gambia	2390	1310	510	800	1080
Ghana	31689	14429	6003	8426	17260
Guinea	18500	7000	1300	5700	11500
Guinea Bissau	4040	2636	544	2092	1404
Liberia	7560	3945	557	3388	3615
Mali	13500	12300	2464	9836	1200
Mauritania	7800	2100	1500	600	5700
Niger	19000	6694	2768	3926	12306
Nigeria	1117900	59300	34145	25155	58600
Senegal	117900	10277	3777	6500	3738

Sierra Leone	14015	4400	764	3636	5767
Togo	10167	2819	1500	1319	4181
Central Africa					
Burundi	6288	4099	1011	3088	2189
Cameroon	63750	32670	3250	29420	31080
Central African republic	23700	9300	440	8860	14400
Chad	31300	7300	300	7000	24000
Congo	11000	10800	1245	9555	200
Equatorial Guinea	1540	1090	447	643	450
Gabon	7700	5300	700	4600	2400
Rwanda	12385	5745	970	4775	6640
Sao Tome & Principe					
Zaire	145000	60900	2800	58100	84100
East and Southern Africa					
Comoros	936	936	491	445	0
Djibouti	2800	1132	412	720	1668
Ethiopia	35000	13500	4000	9500	21500
Kenya	55000	43908	6275	37633	11092
Lesotho	4000	2591	604	1987	1409
Madagascar	50000	10500	5200	5300	39500
Malawi	11651	9651	2208	7443	2000
Mauritius	1800	1800	1660	140	0
Mozambique	27113	13660	5113	8547	13453
Namibia	64060	42002	4358	37644	22058
Somalia	21600	7409	2757	4652	14191
Swaziland	2821	2757	689	2068	..
United Republic of Tanzania	85500	23200	3600	19600	62300
Uganda	27037	6155	1800	4365	20872
Zambia	35000	20653	5500	15153	14347
Zimbabwe	98521	35681	12738	22943	62840
Total Sub-Saharan Africa	1164084	535312	133280	402032	628772
Developing Africa	1404048	708163	242417	465746	695885
Source: International Road Federation, World Road Statistics 1985-1988 (London, 1989) and ECA secretariat's estimates.					
* Definition:					
- Main roads are the national road networks.					
- Secondary roads include all the regional or provincial roads					
- Tertiary roads include all the feeder roads.					

Road traffic statistics are hard to come by, though there is no doubt that traffic volume is increasing fast on African roads. However, the unfavourable economic situation has affected transportation activities, most notably as regards vehicle fleets, which grew less rapidly during the 1980s, so that their age increased considerably.

Table X.4 below show the vehicle park in developing Africa by country and subregional economic groupings. For developing Africa as a whole the number of vehicles increased from about 5.9 million in 1980 to 7.9 million in 1988 - an average annual

growth of 3.7 per cent, which is roughly 0.7 per cent more than that of the population. North Africa had the highest number of vehicles in 1988, about 49 per cent of the total, followed by West Africa (26.8 per cent) and East and southern Africa (18.3 per cent). In Central Africa, the subregion with the lowest proportion of the regional total (5.9 per cent), the number of vehicles is growing faster than in any other grouping (about 6.7 per cent per annum during 1980-1988 against 4.5 per cent in ECOWAS, 3.8 per cent in North Africa and 2.1 per cent in PTA).

Table X.4
Vehicle park in developing Africa by subregion and country, 1980 and 1988

	Thousands of cars		Thousands of trucks and buses		Parks in thousands		Annual average percentage growth of park 1980-1988
	1980	1988	1980	1988	1980	1988	growth o
North Africa							
Algeria	396782	725000	350000	480000	745782	1205000	6.16
Egypt	428300	425000	127500	247000	555800	672000	2.4
Libyan Arab Jamahiriya	386043	404000	181598	312000	567641	716000	2.94
Morocco	425000	593272	180000	245725	605000	838997	4.17
Sudan	57569	34000	71000	45000	126569	79000	-5.91
Tunisia	152762	171000	132663	177000	285425	348000	2.51
West Africa							
Benin	9592	22000	7025	12000	16617	34000	9.36
Burkina faso	..	11000	..	13000	..	24000	..
Cote d'Ivoire	116490	168000	63349	91000	179839	259000	4.67
Gambia	7321	5500	1406	800	8727	6300	-3.99
Ghana	64000	58000	46000	46000	110000	104000	-0.7
Guinea	12000	13000	8000	13000	20000	26000	3.33
Guinea Bissau	2750	3200	2100	2400	4850	5600	1.81
Liberia	20067	8000	13753	3000	33820	11000	-13.1
Mali	2669	21000	863	8000	3532	29000	30.11
Mauritania	11262	8000	8437	5000	19699	13000	-5.06
Niger	15772	16000	17347	18000	33119	34000	0.33
Nigeria	500000	773000	350000	606000	850000	1379000	6.24
Senegal	50875	85000	27767	37000	78642	122000	5.64
Sierra Leone	75000	23000	40000	7000	115000	30000	-15.46
Togo	20000	25000	10000	14000	30000	39000	3.33
Central Africa							
Burundi	6000	8000	4000	10000	10000	18000	7.62
Central African Republic	9000	8100	5000	8000	14000	16100	1.76
Cameroon	55000	90000	42000	79000	97000	169000	7.19
Chad	5000	8000	4500	6000	9500	14000	4.97
Congo	20000	26000	14000	20000	34000	46000	3.85
Equatorial Guinea	4000	5000	3000	3200	7000	8200	2
Gabon	32274	18000	4149	12000	36423	30000	-2.4
Rwanda	3786	12500	5611	8500	9397	21000	10.57
Zaire	43818	94000	34278	86000	78096	180000	11
East and Southern Africa							
Angola	75000	122000	50000	41000	125000	163000	3.37
Botswana	7921	17000	15000	26000	22921	43000	8.18
Djibouti	6000	13000	2500	1000	8500	14000	6.44
Ethiopia	40429	43000	14248	20000	54677	63000	1.79
Kenya	155000	128000	122000	143000	277000	271000	-0.27
Lesotho	3254	..	1484	..	4738	..	..
Madagascar	50000	26000	25000	22000	75000	48000	-5.43
Malawi	11815	15000	13547	15600	25362	30600	2.37
Mauritius	25640	33000	6037	13000	31677	46000	4.77

Mozambique	50000	84000	20000	24000	70000	108000	5.57
Seychelles	3583	4200	1134	1600	4717	5800	2.62
Somalia	5000	19000	6000	11000	11000	30000	13.36
Swaziland	11615	15000	5035	15000	16550	30000	7.64
United Republic of Tanzania	71365	43000	28181	52000	99546	95000	-0.58
Uganda	30000	31000	20000	14000	50000	45000	-1.31
Zambia	74595	96000	14475	67000	89070	163000	7.85
Zimbabwe	211694	173000	26769	79000	238463	252000	0.69
Developing Africa	3766043	4723772	2126756	3160825	5892799	7884597	3.71

Source: World Road Statistics, 1989 edition, International Road Federation, Washington, U.S.A.
Motor Vehicle Manufacturer's Association of the United States, Detroit, Michigan, U.S.A.

With 7.9 million vehicles in 1988, developing Africa accounted for only 1.5 per cent of the world total, whereas the regional population was 11.4 per cent of world population. Thus, as shown in table X.5 below, motorization was 21.13 vehicles per thousand people for developing Africa as a whole in 1988 — virtually

the same as in 1980. The motorization rate declined during that period in North Africa and in East and southern Africa; but in West Africa and Central Africa it increased annually by 0.5 per cent and by 3.6 per cent, respectively.

Table X.5
Motorization rates in developing Africa by subregion and by country, 1980 and 1988

	Cars		Trucks and buses		All vehicles		Annual average percentage growth of mobilization
	Per thousand population						
	1980	1988	1980	1988	1980	1988	198
North Africa							
Algeria	21.26	30.46	18.75	20.16	40.00	50.62	-2.98
Egypt	10.32	8.26	3.07	4.80	13.39	13.06	-0.31
Libyan Arab Jamahiriya	126.86	95.06	59.68	73.43	186.54	168.51	-1.26
Morocco	21.93	24.80	9.29	10.27	31.21	35.06	1.47
Sudan	3.06	1.43	3.89	1.89	6.58	3.32	-8.70
Tunisia	23.93	21.93	20.76	22.70	44.71	44.64	-0.02
West Africa							
Benin	2.77	4.94	2.03	2.69	4.80	7.63	5.98
Burkina faso	..	1.29	..	1.52	..	2.81	..
Cote d'Ivoire	13.99	14.50	7.61	7.85	231.60	22.36	0.43
Gambia	11.55	6.69	2.22	0.97	13.76	7.66	-7.06
Ghana	5.96	4.13	4.28	3.28	10.24	7.41	-3.97
Guinea	2.19	1.96	1.46	1.96	3.64	3.92	0.90
Guinea Bissau	3.40	3.40	2.60	2.55	6.00	5.96	-0.08
Liberia	10.81	3.33	7.41	1.25	18.22	4.56	-15.85
Mali	0.41	2.63	0.13	1.00	0.54	3.63	27.01
Mauritania	7.27	4.20	5.45	2.62	12.72	6.82	-7.50
Niger	2.86	2.29	3.15	2.57	6.01	4.06	-2.61
Nigeria	5.90	7.02	4.13	5.50	10.03	12.52	2.81
Senegal	8.92	11.88	4.87	5.17	13.78	17.06	2.70
Sierra Leone	23.04	5.84	12.29	1.78	35.33	7.62	-17.45
Togo	7.76	7.44	3.88	4.16	11.64	11.60	-0.04
Central Africa							
Burundi	1.46	1.55	0.97	1.94	2.43	3.50	4.65

Cameroon	6.32	8.03	4.83	7.05	11.15	15.07	3.84
Central African Republic	3.94	2.90	2.19	2.86	6.12	5.76	-0.76
Chad	1.12	1.48	1.01	1.11	2.12	2.59	2.54
Congo	12.46	12.38	8.72	9.52	21.18	21.90	0.42
Equatorial Guinea	11.73	12.59	8.80	8.06	20.53	20.65	0.08
Gabon	40.49	16.71	5.21	11.14	45.70	27.86	-6.00
Rwanda	0.74	1.88	1.09	1.28	1.83	3.15	7.05
Zaire	1.66	2.80	1.30	2.56	2.96	5.35	7.69
East and Southern Africa							
Angola	9.71	12.95	6.47	4.35	16.19	17.30	0.84
Botswana	8.79	14.60	16.65	22.34	25.44	36.94	4.77
Djibouti	20.00	39.76	8.33	3.06	28.33	42.31	5.30
Ethiopia	1.07	0.93	0.38	0.43	1.45	1.37	-0.75
Kenya	9.32	5.56	7.34	6.21	16.65	11.77	-4.24
Lesotho	2.40	..	1.10	..	3.50	..	..
Madagascar	5.74	1.95	2.87	1.95	8.61	4.26	-8.41
Malawi	1.94	1.84	2.22	1.91	4.16	3.75	-1.29
Mauritius	26.54	31.49	6.25	12.40	32.79	43.89	3.71
Mozambique	4.13	5.61	1.65	1.60	5.78	7.22	2.80
Seychelles	56.87	61.76	18.00	23.53	74.87	85.29	1.64
Somalia	1.07	3.23	1.28	1.87	2.35	5.10	10.15
Swaziland	20.59	20.35	8.93	20.35	29.52	40.01	4.10
United Republic of Tanzania	3.80	1.74	1.50	2.10	5.31	3.84	-3.96
Uganda	2.37	1.91	1.58	0.86	3.96	2.78	-4.32
Zambia	13.21	12.82	2.56	8.95	15.77	21.77	4.11
Zimbabwe	30.20	18.69	3.82	8.53	34.02	27.22	-2.75
Developing Africa	13.99	13.65	7.05	7.48	21.05	21.13	0.05
Source: World Motor Vehicle Data, World Bank reports.							

Since very few African countries produce or even assemble motor vehicles, imports are the main source of such equipment; and with the onset of the 1980s they began to decline drastically. According to the review *Marchés Tropicaux et Méditerranéens*, regional imports from the seven major world producers (France, Germany, Italy, Japan, Sweden, United Kingdom and USA) fell from 211,214 units in 1982 to 139,202 units in 1988. Car imports into the sub-Saharan countries more than halved, from 158,911 units in 1982 to only 64,922 units in 1988. According to the above review, the car market in some countries has fallen below the minimum economic size, which has forced some distributors to sell the cars of several different constructors. The situation is similar for trucks and other types of motor vehicles.

With a large part of the road network in a state of disrepair and an ageing vehicle park — the average age is over 10 years and in Algeria, for example, 20 per cent of the vehicles are more than 20 years old — accident rates have soared to levels which are 10-50 times those experienced in industrialized countries. National statistics in some countries show that road

accidents have become the major cause of death among the economically active population. The economic cost of road accidents is estimated at 2 per cent of GNP, an enormous burden since it is equivalent to a year's growth of GNP.

The part played by cities in the economic life of the region grows constantly. It is estimated that 50-70 per cent of GDP is generated there; and most industrial and manufacturing centres are city-bound. In those conditions, the inefficiency of urban transport systems represents a major bottleneck of economic and social development.

Bus and taxi services dominate urban transport in developing Africa. It is only in North Africa, in Cairo and Tunis, that modern train systems have been introduced. Except in a few cities, the situation is best described as one of crisis: demand has overtaken supply to a very great extent. In general, the volume of public transport is declining and its availability is very poor — in some cases, less than 40 per cent of existing vehicles are available for service. Moreover, in present circumstances it is increasingly difficult for

Governments to subsidize public transport and current policies make it hard for the private sector to compensate for the inadequacies of the public sector. In some countries, taxi and bus tariffs are fixed by regulation at levels which make it impossible for private operators to provide services at a reasonable profit. Also, restrictions on the import of vehicles and spare parts are a considerable impediment to the development of adequate transport services. In countries such as Zambia, foreign exchange is so scarce that hardly any imports have been made through legal channels in recent years.

C. Railway transport

Apart from the Trans-Gabon railway, no major addition was made during the 1980s to the railways of developing Africa. The length of the network is 80,706 km, which gives an average density per 100 sq km of

The 1980s were a period of decline for the railways of the region, which saw their share of commercial traffic drop at the expense of road traffic and huge losses accumulate. Competition by road transport operators undoubtedly played a role, but poor management was the dominant factor in the loss of market share and the overall economic situation exacerbated the losses. For a group of 12 mainly francophone countries, passenger traffic measured in million passenger-km declined during 1981-1989. Goods traffic increased in that year but only by a modest 3.7 per cent. For the whole of developing Africa, goods traffic was in 1986 only 5.6 per cent higher than in 1970, and it grew by a mere 0.5 per cent a year during 1980-1986.

Currently, the railway systems are being reorganized and restructured. The main objective is to improve their management by granting greater autonomy, which would allow tariffs to be set at remunerative prices and excess labour to be shed. One policy which

Table X.6
Railway passenger traffic in selected African countries, 1981-1988
(Million passenger-km)

	1981	1982	1983	1984	1985	1986	1987	1988
Senegal	107.0	102.0	89.0	63.0	59.0	67.0	89.0	90.0
Mali	130.0	147.0	157.0	150.0	173.0	176.0	146.0	198.0
Cote d'Ivoire and Burkina Faso	1074.0	910.0	998.0	836.0	819.1	688.0	493.0	449.0
Togo	97.0	99.0	103.0	77.0	67.0	61.0	60.0	58.0
Benin and Niger	188.0	188.0	157.0	138.0	237.0	139.0	141.0	124.0
Cameroon	234.0	322.0	391.0	463.0	504.0	412.0	444.0	470.0
Gabon	15.0	13.3	19.3	30.6	26.5	340.8	33.6	48.4
Congo	358.0	390.0	380.0	408.0	437.0	456.0	400.0	419.0
Zaire	649.0	415.0	407.0	373.0	339.0	408.0	462.0	504.0
Djibouti and Ethiopia	310.0	306.0	360.0	268.0	221.0	276.0	275.0	269.0
Madagascar	246.0	262.0	225.0	206.0	175.0	199.0	205.0	240.0
Total	3408.0	3154.3	3286.3	3012.6	2957.5	2912.8	2798.6	2851.4

Source: Marchés tropicaux, No. 2312, 2 March 1990.

only 2.6 km, compared with 60 km in Europe. Moreover, the network is highly heterogeneous. There are nine different gauges. Only three are widely used, whose widths are 1.435 metres (14.5 per cent of the network), 1.067 metres (12 per cent) and 1.087 metres (11 per cent). The subregional picture also varies: North Africa has 18,636 km but only 7 per cent of it is electrified; the equipment of West African railways is generally obsolete; and on the Central African ones the 7,480 km of line are distributed over several gauges: three systems use 1.087 metres; the other four use 1 metre; and no interconnection among them is possible. In East and southern Africa, the network of 23,000 km is divided among eight systems using 1.067 metres and four systems using 1 metre, but there are possibilities of interconnection.

seems to have gained favour in francophone countries is the contrat-programme (performance contract) under which the railway administration enters into a formal agreement with the Government on specific goals and in return obtains management autonomy.

In Cameroon, for example, after signing such a contract, Régicam, the national railway, launched a vigorous programme of rehabilitation and recovery. Since the end of 1988, passenger and goods traffic on the Douala-Yaoundé line have both rebounded.

In the Congo, the Chemins de Fer Congo Ocean (CFCO) — which manages the Brazzaville-Pointe Noire line — and the Compagnie Minière de l'Ogoué (COMILOG) — which owns the railway that transports

manganese ore from Gabon to the CFCO lines — are reorganizing their operations.

In Senegal, the national railways have made great efforts to improve efficiency and profitability. Despite fluctuations, the trend in traffic has been upward since 1981, yet the number of employees has fallen by 26 per cent since 1984.

In Zaire, a recovery plan was put in place and a contrat-plan signed by the Government and the Office National des Transports (ONATRA) which manages one of the two Zairian railway systems.

D. Shipping

The volume of seaborne trade of developing Africa in 1988 attained 583 million tons — 7.8 per cent of the world total. As shown in table X.7 below, there is a large discrepancy between the volumes of unloaded and loaded goods: in that year, the latter category amounted to 407 million tons and the former to 176 million tons — 10.9 per cent and 4.6 per cent of the corresponding world totals, respectively.

Table X.7 Seaborne trade of developing Africa, 1980 and 1985-1988 (million tons)						
	Loaded			Unloaded		
	Oil	Non-oil	Total	Non-oil	Oil	Total
1980	305	90	394	86	72	158
1985	272	94	366	95	75	170
1986	285	95	380	103	65	168
1987	281	99	380	101	66	167
1988	304	103	407	108	68	176

Source: UNCTAD, Review of Maritime Transport (various issues)

Oil and oil products constituted the bulk of commodities loaded (304 million tons in 1988 compared to 103 million tons for dry cargo). Since 1980, oil exports have tended to stagnate because of OPEC quotas and low demand in industrialized countries — for which reason the volume of goods loaded was only 3.3 per cent more in 1988 than in 1980. Moreover, the tonnage of dry cargo loaded increased on average by only 1.7 per cent a year over the same period.

As to goods unloaded, the oil trade declined but that of dry cargo — which formed the major part of the tonnage involved — grew by an average of 2.9 per cent a year.

There has been no fundamental change since 1980 in the share of developing Africa in world trade: for goods loaded it represented 10.7 per cent in 1980 and 10.9

per cent in 1988; and for goods unloaded 4.3 per cent in 1980 and 4.6 per cent in 1988.

African shipping and ship-operating companies are small and own few ships. As may be seen from table X.8 below, the regional share of world tonnage was only 7.3 per cent in 1988 — slightly more than in 1980 (7.1 per cent). Companies in developing Africa predominantly serve national trade and have little involvement in coastal trade with other countries. Governments have been interested chiefly in securing for their companies a larger share of the trade generated by their national economies, in accordance with the provisions of the United Nations Code of Conduct under its 40/40/20 rule. That Convention has been ratified by most member States and in particular by EEC countries. The latter, however, did so with the reservation that sea trade outside liner conferences would not be subject to the terms of the Convention and that competition should be preserved.

Table X.8 Seaborne trade, merchant fleets and freight charges in developing Africa and world wide, 1980 and 1985-1988					
	1980	1985	1986	1987	1988
Seaborne trade (thousand tons)					
Africa					
Loaded	394	366	380	380.1	406.6
Unloaded	158	170	167.6	166.9	175.8
World					
Loaded	3676	3762	3459	3505	3736
Unloaded	3711	3427	3533	3628	3866
Fleet tonnage					
Africa (per cent)	7.1	8.0	7.5	7.3	7.7
World	682.8	664.8	639.1	632.3	627.9
Freight charges (per cent of import values)					
Africa	13.42	11.27	11.08	11.30	11.30
World	6.64	5.78	5.34	5.24	5.27

Source: UNCTAD, Review of Maritime Transport (various issues).

Freight charges represent a higher proportion of import values in developing Africa than in other areas. As can be seen from the table, they have been consistently rather more than double the world average. However, the burden of freight charges declined between 1980 and 1985 in the region, as in the world at large, because of the growth of competition; and it remained broadly stable thereafter.

During the 1980s there was substantial investment in the seaports of the region. Total berthing capacity for ocean-going vessels increased four-fold from 150 berths in 1980 to 600 berths in 1988 in the 80 largest ports. There was also substantial construction of unitized and bulk terminals in most countries, to cope

with technological change. Despite those developments, the distribution of traffic among ports changed little and most investment took place in established locations. The capacity of the region's ports remained very limited and traffic volumes low — only a handful of them handle more than 10 million tons per annum. They have in consequence relatively high operating costs and the poor quality of their services is a significant impediment to trade.

Port technology has undergone considerable changes in recent years and the growing utilization of containers and container ships is everywhere one of its most conspicuous signs — though developing Africa still lags significantly behind other regions of the world. Nevertheless, container traffic in the region did increase: in 1988 it grew by 7.9 per cent and exceeded 1 million tons.

E. Inland Waterways

Inland water transport is inexpensive, energy-efficient and environmentally acceptable. Nevertheless, it has failed to make much progress in recent years despite the considerable costs, in terms of energy consumption and investment in infrastructure, involved in employing other types of transport.

There are not many commercially important navigable waterways in the region, however, and statistics are almost unobtainable on the traffic which they carry. In the east and centre of the continent the Great Lakes provide excellent opportunities for inland water transport (but information is sorely lacking on traffic flows).

F. Multimodal Transport

With the introduction of containerization, multimodal transport has continued its rapid expansion over the past decade in industrialized countries and began to affect significantly the trade of developing countries — but, once again, those in Africa were slow to adopt the multimodal concept. At present, a high percentage of the containers entering the region are still consigned only to the ports: the cargoes are then transported inland in bulk form, thereby forfeiting most of the advantages of containerization.

Progress is further impeded by regulations concerning the movement of containers, custom inspections etc. Lack of co-operation between custom services and other regulatory bodies is a particularly serious problem. Customs procedures are excessively bureaucratic, cumbersome and complex; and documentation has not been modernized and harmonized.

G. Air Transport

Air transport expanded considerably during the 1980s and the prospects are of continuing growth in the 1990s despite the temporary difficulties created by the Gulf war. In 1989, for the world as a whole more than 1,116 million passengers took aircraft flights and it is expected that, by the year 2000, over 2 billion a year will do so.

Although prospects are favourable, very large investments will have to be made to accommodate such a level of demand, requiring not only resources but also profound changes in the very structure of air transport. Already, faced with liberalization, deregulation and the prospect of a common European space in 1992, major international airlines are positioning themselves to preserve or increase their share of the market.

The situation is one in which the airlines of developing Africa are not very favourably placed: the share of the region in world air traffic is very low (3.4 per cent); and the traffic has been growing more slowly than in other regions of the world. Statistics for 12 African countries not members of the *Agence pour la Sécurité et la Navigation Aérienne* (ASECNA), show that their passenger traffic grew in 1980-1989 by 4.7 per cent a year, compared to a world average of 7.7 per cent. Their cargo traffic grew faster — by 10.2 per cent a year — but that was still lower than the world average. Furthermore, the regional airlines accounted in 1989 for only 1.2 per cent of world passenger traffic, 0.9 per cent of world revenue-passenger-km and 1 per cent of world freight traffic.

While airlines worldwide made an aggregate profit of \$9.5 billion in 1989, those of the region accumulated operating deficits totalling \$200 million. Their situation had already been deteriorating for a number of years and the very existence of most of them is threatened by their financial problems.

By world standards, airport infrastructure in developing Africa is backward. The International Civil Aviation Authority (ICAO) lists, it is true, 163 regular and alternative airports in 52 countries of the region which are equipped for international flights. Nevertheless much remains to be done to improve air transport services, security, safety and facilitation at major international airports, as well as the legal aspects of air traffic, such as traffic rights.

Their size, cost structure and current methods of management render the 60 airlines concerned unable to compete in an increasingly difficult market. They have a fleet of some 600 planes, many of which are obsolete and difficult to maintain because of the lack

of necessary personnel, plant and finance. What is particularly worrying is that many of the planes no longer conform to international standards and should therefore be replaced. Personnel is generally superabundant: the 36 airlines that are members of the African Airlines Association (AfrAA) have in aggregate 80,000 employees for 17.3 million passengers per annum. Europe-based airlines service annually 158.4 million passengers. There are 216 passengers each year per employee in the African airlines and 480 in the European ones. While the latter transported 133,530 passengers per plane per annum, the former transported only 49,466. Furthermore, the African network is not well adapted to the needs of the region. Traffic is still oriented towards Europe: 75 per cent of the air links are intercontinental and 80 per cent of the traffic on those links is carried by 27 European airlines. With such disparities, it comes as no surprise that the African airlines' unit costs are much higher. In 1989, per passenger-km, they were evaluated at \$12.9 in Africa, whereas the world average was only \$7.7.

The airlines of the region will have to streamline their operations, reduce costs, reorganize their routings, acquire more modern planes and perhaps even regroup. Great efforts will be called for: if they are not forthcoming, the airlines will not survive. Some of the companies have been looking for ways of creating larger airlines. Ghana has proposed a pan-African airline. It must be admitted, however, that the problems encountered by Air Afrique, which does

operate as a multinational company, do not provide an encouraging precedent.

H. Telecommunications

Telecommunications services and their infrastructure expanded in developing Africa during the 1980s. As shown in table X.9 below, the number of direct exchange lines in developing Africa grew at the rate of 14.5 per cent a year during 1980-1988. The expansion was particularly marked in Algeria, Burundi, Cape Verde, Chad, Egypt, the Gambia, Lesotho, Mauritania, Rwanda and Tunisia: their average annual growth rate was more than 10 per cent between 1980 and 1988. However, there is still a long way to go before the sector approaches operation at the level achieved in industrialized countries or even that to be found in other developing regions.

To take telephone density as an example, there were in 1988 4.16 million main lines in the region — a density of 0.76 per 100 inhabitants. The corresponding ratios in North America, Europe, Latin America and Asia were 32.8, 22.8, 5.87 and 3.45, respectively. There are significant disparities among African countries: telephone penetration averaged only 0.24 per cent in West and Central Africa, but reached 0.41 per cent in East and southern Africa and 2.38 per cent in North Africa.

Table X.9
Direct exchange lines in developing Africa, 1980-1988

	1982	1983	1984	1985	1986	1987	1988	Growth percent *
Thousands								
North Africa								
Algeria	408.21	445.76	465.31	537.06	563.13	634.86	697.21	10.6
Egypt	477.41	58.38	640.61	892.51	940.75	1118.00	1390.20	19.5
Morocco	191.42	201.45	215.42	240.44	253.00	266.19	286.49	7.0
Sudan	48.28	51.86	54.97	57.64	58.15	63.00	63.00	4.2
Tunisia	138.56	152.01	168.80	189.34	216.66	227.66	248.89	10.5
West Africa								
Benin	11.89	12.36	13.21	14.05	13.32	14.00	13.64	2.8
Burkina faso	7.18	7.52	7.64	7.95	8.31	10.05	12.80	9.6
Gambia	2.30	2.30	2.42	2.51	3.00	4.10	5.18	11.3
Ghana	37.33	37.53	38.21	38.24	38.35	39.61	40.44	1.6
Guinea	11.58	13.05	14.63	16.24	18.00	19.00	20.00	10.0
Guinea Bissau	3.14	3.86	4.94	5.50	5.50	5.50	5.50	14.6
Cote d'Ivoire	38.18	42.84	45.33	54.23	64.17	65	70.00	8.1
Liberia	7.05	9.00	7.29	8.24	9.38	9.38	9.38	3.7
Mali	5.83	6.48	7.07	7.24	8.50	8.50	8.77	7.9
Mauritania	3.51	3.71	3.88	4.05	4.57	4.60	4.59	13.2
Niger	7.00	7.45	7.89	8.14	8.50	9.00	9.50	6.2

Nigeria	151.60	182.55	192.56	203.98	215.63	227.46	235.53	5.3
Senegal	19.43	19.86	21.08	22.16	24.81	27.40	28.93	6.1
Sierra Leone	12.05	12.69	14.65	14.06	14.56	15.30	15.30	4.4
Togo	5.00	8.09	8.39	8.35	10.14	10.69	9.60	6.5
Central Africa								
Burundi	..	2.43	3.81	5.31	6.63	7.50	7.80	26.3
Cape Verde					4.59	5.77	6.00	14.4
Central African Republic	2.86	1.12	2.55	2.75	3.90	4.10	4.34	6.5
Cameroon	21.32	25.09	28.12	29.86	31.18	32.4	35.00	9.3
Chad	0.67	1.16	1.59	1.97	4.82	4.82	4.82	36.5
Congo	8.96	9.55	9.75	10.16	10.30	10.57	15.01	7.4
Equatorial Guinea					1.12	1.20	1.30	7.5
Gabon		10.97			14.00	14.00	17.00	
Rwanda	4.39	4.67	4.89	5.17	5.44	6.56	8.17	12.0
Zaire	25.05	25.63	28.51	28.83	29.00	29.00	29.19	2.7
East and Southern Africa								
Angola	49.28	45.89	46.00	47.35	48.09	62.00	65.00	5.7
Botswana	7.81	8.49	9.50	10.08	10.58	11.75	14.59	9.6
Comoros					1.76	2.08	2.66	
Djibouti	3.41	3.62	3.67	4.05	4.30	4.45	4.80	7.8
Ethiopia	74.56	83.80	89.84	95.57	107.33	108.03	112.60	7.3
Kenya	88.09	95.75	106.15	118.39	129.45	145.27	157.36	9.9
Lesotho	4.87	5.20	5.41	7.36	10.17	9.00	11.46	14.4
Madagascar	19.44	19.65	21.14	22.23	23.46	25.00	25.50	3.7
Malawi	16.45	17.10	18.72	18.63	21.23	22.47	23.60	6.4
Mauritius	30.26	32.86	37.73	39.94	43.41	45.99	46.32	8.8
Mozambique	36.47	36.86	37.56	38.33	39.84	40.17	40.79	2.7
Sao Tome & Principe	1.5	1.85	1.9	1.9	1.9	1.93	2.09	6.3
Seychelles	3.92	4.11	4.95	5.33	6.72	6.80	7.22	9.5
Somalia					15.35	7.00	7.50	
Swaziland	6.78	7.43	8.07	8.35	9.22	9.64	10.53	9.2
Uganda	22.96	24.07	20.97	25.58	25.83	27.85	27.88	3.8
United Republic of Tanzania	42.01	44.00	47.50	52.10	54.46	58.92	66.06	6.5
Zimbabwe	102.00	103.63	105.69	106.72	111.57	112.85	118.43	2.7
Developing Africa	2195.00	2456.00	2617.00	3061.00	3301.00	3918.00	4386.00	14.5
Source: ITU, African Telecommunications Statistics, document No. ATBC-90/25 December 1990.								
* Annual rate of growth								

The telecommunications equipment utilized in the region is still predominantly of the analogue type, though digitalization of the networks has begun. The quality of telephone service and its efficiency are still unsatisfactory. Some indicators of the operation of telephone service are given in table X.10 below. In most African countries the telephone density is still below 1 per cent, yet equipment is utilized to about 77 per cent of capacity, as a regional average. In some countries, for example, Chad, Comoros, Guinea and Somalia, the telephone can be found only in the urban

areas. The rate of telephone utilization by the rural population is very low, ranging from 1 per cent in Rwanda to 45 per cent in Ghana. The number of faults per subscriber line is some 6-12 times the acceptable level. At least 20 per cent of local calls, 64 per cent of national ones and 40 per cent of international ones fail to be connected because of inefficient operations. In some countries, the public telephone system has so seriously deteriorated because of years of neglect that private systems now substitute for a public one.

Table X.10
Direct telephone exchange lines in developing Africa, 1988

	Density a/	Equipment Capacity b/	Equipment use b/	Percentage residential	Percentage automatic	Waiting list
North Africa						
Algeria	2.93	877.93	697.21	95.00	524.20	
Egypt	2.77	1635.50	1390.20	75.00	94.00	1.14
Morocco	1.19	326.59	286.49	48.00	80.00	204.69
Sudan	0.26	97.23	63.00	41.00	96.00	22.62
Tunisia	3.19	386.40	248.89	56.00	99.00	104.38
West Africa						
Benin	0.31	23.50	13.64	61.00	100.00	2.94
Burkina faso	0.15	20.40	12.80	73.00	90.00	0.56
Gambia	0.63	6.56	5.18	66.00	98.00	3.17
Ghana	0.29	57.41	40.44	58.00	87.00	29.64
Guinea	0.37	23.00	20.00	60.00	90.00	
Guinea Bissau	0.59	6.50	5.50		100.00	
Cote d'Ivoire	0.63	85	70	53	98	
Liberia	0.39	41.00	9.38	43.00		5.69
Mali	0.11	12.11	8.77	18.00	93.00	4.12
Mauritania	0.24	6.07	4.59	33.00	99.00	1.45
Niger	0.13	13.48	9.50	39.00	96.00	1.25
Nigeria	0.21	365.63	235.33	55.00	100.00	290.55
Senegal	0.41	37.46	28.93	38.00	95.00	7.84
Sierra Leone	0.40	15.65	15.50	61.00	99.00	3.14
Togo	0.28	10.72	9.60	43.00	96.00	12.39
Central Africa						
Burundi	0.15	8.35	7.80	80.00	100.00	2.05
Cape Verde	1.67	10.25	6.00	34.00	100.00	5.01
Central African Republic	0.15	7.10	4.34	47.00	100.00	0.68
Cameroon	0.31	49.1	35	7	100	6.23
Chad	0.09	4.93	4.82	36.00	99.00	0.22
Congo	0.71	24.27	15.01	42.00	98.00	4.62
Equatorial Guinea	0.33		1.30	34.00		
Gabon	1.55	29.30	17.00			
Rwanda	0.12	12.80	8.17	39.00	100.00	2.41
Zaire	0.09	39.95	29.19		68.00	10.42
East and Southern Africa						
Angola	0.69	69.13	65.00	15.00	40.00	21.91
Botswana	1.22	26.33	14.59	38.00	98.00	2.95
Comoros	0.6	3.58	2.66	79	100	0.86
Djibouti	1.25	6.00	4.80	51.00	100.00	
Ethiopia	0.24	150.84	112.60	59.00	85.00	87.81
Kenya	0.70	224.16	157.36	42.00	92.00	63.89
Lesotho	0.67	15.08	11.46	25.00	99.00	5.33
Madagascar	0.23	40.28	25.50	41.00	79.00	2.82
Malawi	0.30	32.57	23.60	46.00	96.00	5.59
Mauritius	4.21	63.55	46.32	61.00	100.00	41.60
Mozambique	4.21	63.55	46.32	61.00	100.00	41.60
Sao Tome & Principe	1.76	2.75	2.09	60	100	1.1

Seychelles	10.62	8.64	7.22	66.00	100.00	1.44
Somalia	0.13	18.87	7.50	82.00	98.00	
Swaziland	1.43	16.30	10.53	47.00	98.00	2.56
Uganda	0.17	58.14	27.88	34	86	25.35
United Republic of Tanzania	0.27	81.21	66.06	27.00	79.00	75.96
Zambia	0.77	92.37	58.49	52	100	29.11
Zimbabwe	1.27	157.28	118.43	70.00	99.00	41.34
Developing Africa	0.76	5690.00	4387.00	59.00	93.00	1840.00

Source: ITU, African Telecommunications Statistics, document No. ATBC-90/25 December 1990.
a/ Lines per 100 inhabitants.
b/ Thousand lines.

The programme of the Pan-African Telecommunications Network (PANAFTEL) has recorded some major successes, particularly in the subregion of East and southern Africa, where substantial developments have occurred in the construction of interstate links and the introduction of inter-country tariff rates. In that subregion, 1,835 automatic exchanges with a capacity of 1,122,620

lines have been installed, whereas the capacity of such facilities totals 690,992 lines in West Africa and 227,105 lines in Central Africa. North Africa is easily the leading subregion with a total of 3,668,650 automatic lines.

Table X.11
Telephone sets in service in developing Africa, 1988

	Density a/	Sets installed b/	Sets in use b/
North Africa			
Algeria	4.03	958.79	74.00
Egypt	2.90	1455.00	91.00
Morocco	1.51	361.80	80.00
Sudan	0.33	77.92	93.00
Tunisia	4.27	333.19	
West Africa			
Benin	0.37	16.20	90.00
Burkina faso	0.21	17.58	88.00
Gambia	0.88	7.21	94.00
Ghana	0.54	75.18	54.00
Guinea	0.61	33.00	100.00
Guinea Bissau			
Cote d'Ivoire	0.79	89	89
Liberia			
Mali	0.16	12.64	95.00
Mauritania	0.32	6.17	84.00
Niger	0.16	11.74	98.00
Nigeria	0.66	722.07	89.00
Senegal			
Sierra Leone	0.38	14.90	
Togo	0.41	14.00	93.00
Central Africa			
Burundi	0.19	9.60	81.00
Cape Verde	2.18	7.84	81.00
Central African Republic	0.25	7.27	98.00
Cameroon	0.54	60.77	

Chad	0.18	9.86	100.00
Congo	1.11	23.37	
Equatorial Guinea			
Gabon	2.36	26.00	
Rwanda	0.17	11.20	99.00
Zaire	0.10	32.12	
East and Southern Africa			
Angola	0.82	77.00	
Botswana	2.22	26.65	88.00
Comoros	0.97	4.28	100
Djibouti	1.98	7.60	
Ethiopia	0.29	138.47	85.00
Kenya	1.50	337.01	93.00
Lesotho	1.13	19.16	94.00
Madagascar	0.40	43.60	
Malawi	0.63	50.00	74.00
Mauritius	6.58	72.34	73.00
Mozambique	6.58	72.34	73.00
Sao Tome & Principe	2.35	2.8	
Seychelles	20.50	13.94	
Somalia	0.27	15.79	100.00
Swaziland	3.05	22.42	81.00
Uganda	0.37	59.65	88
United Republic of Tanzania	0.53	130.50	
Zambia	1.21	91.58	85
Zimbabwe	3.03	282.09	51.00
Developing Africa	1.11	6353.00	83.00

Source: ITU, African Telecommunications Statistics, document No. ATDC - 90/25-EF, December 1990.
a/ Sets per 100 inhabitants.
b/ Thousand sets

I. Broadcasting

Radio transmitters are relatively well distributed in the region: 964 transmitters of sound programmes were operating in 1987. However, only a limited number of programme channels were available and in a majority of countries only one channel existed. In 39 countries of the region, very high frequency (VHF) broadcasting was provided in addition to medium frequency (MF) or high frequency (HF). The average coverage of transmissions was 78 per cent on the basis of land area and 70 per cent on the basis of population. The number of receivers per 100 inhabitants varied between 1.45 and 45, with a regional average of 12, which meant that approximately one family in two owned a radio receiver. The number in use has increased rapidly, however: it more than doubled in 1980-1987. In sub-Saharan Africa, there were 66

million in 1988 according to UNESCO data, compared to 31 million in 1980¹⁵.

Television services are less developed than radio and the coverage is significantly less, in terms either of area or of population (a median of 40 per cent in the latter case). The average ownership density of TV receivers in the region is a very low 3 per 100 inhabitants. The penetration, in terms of the number of receivers, increased rapidly from less than 6 million in 1980 to more than 11 million in 1987. In sub-Saharan countries there were 6.6 million in 1988 (3.5 million in 1980), equivalent to 1.4, compared to a world average of 14.8, per 100 inhabitants.

15 UNESCO *Yearbook 1989* (Paris, 1990).

J. Postal Services

There were in 1989 some 32,000 permanent postal offices in developing Africa, 6 per cent of the world network¹⁶. Even though the coverage remained low, at one office per 20,000 inhabitants, it had nevertheless improved significantly — it was one per 85,000 inhabitants in the early 1980s. The standard set by the Universal Postal Union (UPU) of one office per 6,000 inhabitants is still far from being achieved, but the progress made is remarkable, bearing in mind the unfavourable economic conditions in the region.

As for the consumption of postal services, it is lower than in any other region in the world: the number of letters handled annually per inhabitant was only 6.4 in sub-Saharan Africa in 1989, less than half the world average of 15.2. The situation was better for international traffic, where the ratio in the African region averaged 1.1, compared to 0.77 for all the developing countries combined. The development of postal services is hampered by the poor equipment employed; that situation can be remedied only in the long term and only if the requisite resources are made available.

Nevertheless, policy changes could contribute to an improvement in efficiency. Better training for the staff is one important concern. The general policy of setting postal rates at low levels could be reviewed, since it makes it difficult to mobilize resources for expansion and improvement. Among the other issues which also deserve attention are the location of transit centres, the provision of postal services in rural areas and the introduction of technically modern services such as fax (telecopying).

K. Policies and Prospects for the Transport and Communications Sector

1. Transport

The key role of transport and communications in development means that the economies of the region cannot be expected to recover and resume normal growth if the sector does not operate efficiently. To achieve that, the region would need first of all to rehabilitate and improve its road infrastructure — an understandable priority since 90 per cent of all commercial transactions take place through the road system and since practically all the remaining transactions (which use railways, planes or boats) start

and eventually end by using a road.

In fact, at the present time most aid donors give priority to roads: by the end of June 1989 the World Bank had granted loans and credits totalling \$33.1 billion to developing countries for investment in the transport system, of which \$17.5 billion was for roads and \$8.9 billion for railways. Of \$6.2 billion received by sub-Saharan African countries, 18.8 per cent was for railways and 65 per cent for roads. Given the lack of financial resources within the region, a choice has to be made. Organizations such as the World Bank give priority to rehabilitation and maintenance of the existing road network rather than the construction of new roads. That, according to the Bank, will require the considerable sum of \$5 billion in the sub-Saharan network to achieve a reasonable level of quality. Though rehabilitation is important, road management also deserves attention.

Apart from the need to fund road maintenance operations adequately, consideration should be given to taxation and generally to cost recovery.

The limited financial resources of the region likewise restrict the possibilities of expanding the other transport modes (the railways; air, sea and inland water transport; and multimodal transport). In the case of the railways, capital costs are such that only a handful of new lines have been created in the last 20 years or so. The priorities are therefore rehabilitation of existing structures and better management.

2. Communications

In communications, technological change poses a big challenge for African developing countries. Their existing network is mostly obsolete and, to survive in a rapidly changing environment, they must catch up with the host of new technologies which have completely transformed communications services in other regions.

The programme of UNTACDA II (the second such Decade) has as its fundamental objective the creation of an integrated transport and communications system. Though the programme of the first Decade reached most of its targets and could be termed a success, the situation of the transport and communications sector remained far from favourable and was, in any case, completely inadequate for the continued development of the region. UNTACDA II was initiated, therefore, to further sectoral development by establishing a framework which would facilitate the

16 *Ibid.*

mobilization of resources and the implementation of projects. The experience gained in the implementation of UNTACDA I was used to create more flexible structures, to set up quantitative objectives and to establish a "from-the-bottom-up approach", i.e., to build up the programme from national and subregional objectives.

The programme of UNTACDA II was prepared on the basis of an extensive review of the sector throughout the region, with special studies for each subsector. One of those studies was the Regional African Satellite Communications System (RASCOM) project, which made a detailed review of the telecommunications sector; identified the main issues and problems; and

outlined future requirements. The probable size of the UNTACDA II programme has still to be established but a good indication is given by the cost of the 806 UNTACDA I projects that were implemented up to the end of 1988, viz., \$12.9 billion. In terms of specific targets, it is noteworthy that UNTACDA II proposes the construction of 15,000 km of main roads; and provides for extensive road rehabilitation: 200,000 km of rural roads, half the network of paved roads, 40 per cent of the network of unpaved roads and a quarter of the network of rural roads. The attainment of such objectives is difficult to contemplate without substantial foreign assistance, not only in terms of finance but also in terms of technical expertise.

PART III : THE SOCIAL SECTORS

XI. SELECTED SOCIAL ISSUES

A. Introduction

The decade of the 1980s was marked in African developing countries by severe socio-economic setbacks. The period may be characterized by a sad catalogue:

- Declining per capita income;
- Soaring external debt;
- Faltering growth of wage employment;
- Falling real wages;
- Rising unemployment, especially among the young; and
- Rapid inflation, resulting in the collapse of living standards among the majority of the population.

The social impact of structural adjustment programmes has also been devastating. The social services sector was and is unable to cope with needs, owing to cuts in budgetary allocations. Moreover, standards in education, health and other social services have deteriorated. The incidence of malnutrition among children is on the increase. Those are some of the social problems facing African countries. This chapter analyses trends in selected social aspects of development: the demographic situation, education, employment, health and nutrition. The focus of analysis is on the two years, 1989 and 1990. However, in order to show more clearly the trends in the selected areas of social development — especially where up-to-date data are not available or data are scattered — the coverage has been extended back to around 1980.

B. The Demographic Situation

Populations continued to grow rapidly in most member States of ECA. The regional total, as estimated by the medium variant of the United Nations assessment, was 608 million in 1989 and 642 million in 1990¹⁷. The annual rate of growth (3 per cent) remained higher than that of other regions of the developing world (e.g., 1.9 per cent in Asia and 2.1 per cent in Latin America). It is estimated that high rates of growth are likely to continue in the region up to the end of the century and that only subsequently will growth slow down gradually as a result of declining rates of fertility. The regional population is projected to increase to 1,149 million in the next 20 years. It is estimated that the regional share of world population will increase from 12.1 per cent in 1990 to 18.8 per cent in the year 2025.

Because of their high fertility, populations are youthful: some 45 per cent of the population of the region in 1990 was under 15 years of age. At the subregional level, the proportion of the population in that age group was 41.5 per cent in North Africa; 46.8 per cent in West Africa; 45.5 per cent in Central Africa; 47.1 per cent in East Africa; and 38.4 per cent in southern Africa¹⁸. The individual countries with a relatively low percentage of the population under 15 years of age were Guinea-Bissau (40.9) and Sierra Leone (44.3). The countries with a relatively high percentage included Kenya (49.9); Côte d'Ivoire (48.1); Nigeria (47.4); Ghana (45.4); and Liberia (45.2)¹⁹.

The percentage of population in the working age group (WAG) — conventionally taken as 15-64 years — and that of dependants (persons under 15 years or aged 65 years and above) were also high in Africa. The data for 1990 show that the WAG percentage in the subregions varied from 51.5 in West Africa to 55.0 in North Africa. The variation among countries in West

17 United Nations, *Population Prospects, 1988* (ST/ESA/SER.A/106) (New York, 1989) and *World Population Prospects, 1990* (ST/ESA/SER.A/120) (New York, 1991).

18 United Nations, *World Population Prospects, 1990*, *op. cit.*

19 *Ibid.*

Africa was from 53.5 per cent in the Gambia to 50.1 per cent in Nigeria.

The dependency ratios (DRs)²⁰ were also generally high in 1990: the subregional percentages were estimated at North Africa, 82.0; Central Africa, 94.0; West Africa, 97.8; and East and southern Africa, 99.5. Among West African countries, they were particularly high in Benin (97.6), Côte d'Ivoire (103.0), Ghana (93.1), Liberia (95.8), Mali (98.0), the Niger (100.6) and Nigeria (99.6). For the region as a whole, the percentage of the population in the WAG and the DR percentage in 1990 were 52 and 92.5 respectively; those for the world were respectively 61.5 and 62.6; for the more developed regions, 66.5 and 50.0; and for the less developed regions 57.1 and 75.5.

The high population growth rate in Africa has resulted in considerable increases in the labour force, a trend which is expected to continue for at least the next 30 years. According to the International Labour Organisation (ILO), the labour force in Africa as a whole (including South Africa) is expected to increase from 189 million in 1980 to 566 million in the year 2020²¹. That three-fold increase in 40 years would be attributable to high fertility and falling mortality rates. Individual countries, e.g., Côte d'Ivoire, Kenya, Nigeria and Zambia, where population growth is very high, are expected to see their labour force increase between three and four times during that period.

It will be necessary to give a greatly enlarged labour force the requisite skills and technical know-how to permit their absorption in productive work. That means that the population increases will exert pressure on social services for education, health care and the like. The available evidence leads to the conclusion that African developing countries are currently finding it difficult to absorb the growing labour force in productive work and that unemployment and underemployment have emerged as their major economic and social problems, particularly within the last decade. In the sections of this chapter which follow, trends in those and other related aspects of the social

situation will be discussed.

C. Education

Policy-makers in the region recognize that human resources development through investment in education is essential for the socio-economic development of their countries. The importance of education and training was emphasized in 1980 in the Lagos Plan of Action and the Final Act of Lagos²². It was emphasized anew in APPER. This section reviews the trends in human resources development, examining the progress made in improving adult literacy; in enrolment ratios for both sexes according to the level of education; and in public expenditure on education.

1. Literacy

The ability to read and write and do basic computations is a fundamental right that most people must enjoy in order to function reasonably in modern society. Most countries have adopted universal literacy as a principal goal. However, some are pursuing it more vigorously than others. Studies have shown that education improves workers' productivity and promotes economic growth. In addition to the direct benefits (of higher earnings) associated with education, available evidence also suggests that education deepens and strengthens the opportunities for personal and social achievement.

Table XI.1 below shows aggregate rates of literacy in respect of almost all African developing countries for the years 1985 and 1990. Those data permit a tentative statement to be made concerning the trend in the second half of the 1980s. They are based on estimates and projections made in 1990 by the United Nations Educational, Scientific and Cultural Organization (UNESCO).

Literacy rates at the subregional level were available for 1985 but could not be calculated for 1990. (The available data for 1990 were percentages or rates, not

20 The dependency ratio (DR) is the ratio of the population in the age groups 0-15 years and 65 years and above to the total population. Persons in those age groups are assumed not to work and hence to be dependent on others for their sustenance.

21 ILO, *Economically Active Population: Estimates 1950-1985 and Projections 1985-2025*, third edition, vol. II (Geneva, 1986), table 1.

22 Organization of African Unity, *Lagos Plan of Action for the Economic Development of Africa, 1980-2000* (International Institute for Labour Studies, Geneva, 1980).

Table XI.1 Frequency distribution of literacy rates in African developing 1985 and 1990 *				
Percentage range:	1985		1990	
	Number of countries	Percentage	Number of countries	Percentage
Up to 30	11	22	9	19
31-40	7	14	6	13
41-50	12	24	11	23
51-60	6	12	7	15
61-70	7	14	8	17
Over 70	7	14	6	13
Sources: ECA, Survey of Economic and Social conditions in Africa, 1986-1987 (E/ECA/CM.14/4); and ECA Secretariat calculations based on UNESCO, <i>Statistical Yearbook 1990</i> (Paris, 1990), table 1.3. * Data for 1990 estimated and based on 47 countries for which data available.				

absolute numbers, for individual countries.) In order to ascertain and analyse the progress made during the period 1985-1990, literacy data are arranged in the above table according to the number of countries falling in various percentage ranges. That can provide some indication of the literacy levels only for the region as a whole, not for the subregions.

The majority of the countries (60 per cent) reported literacy rates of up to 50 per cent in 1985. By 1990 that majority had fallen only marginally (to 55 percent) suggesting rather slow progress despite the strong commitment by most member countries of ECA to the goal of universal literacy.

Data for individual countries within the subregions are given in table XI.1A annexed to this chapter. They show that in North Africa, the Libyan Arab Jamahiriya and the Sudan reported a deterioration, while in the remaining countries, literacy rates improved. In West Africa, literacy rates in general were lower than those in other subregions. However, with the exception of Benin, Guinea and Sierra Leone, considerable increases in literacy rates were reported between 1985 and 1990 in the countries of West Africa. In Central Africa, Equatorial Guinea and Zaire reported the greatest improvement between 1985 and 1990; there were marginal improvements in Burundi, Chad and Rwanda; and the remaining countries in that subregion reported a deterioration. In the subregion of East and southern Africa, significant progress or improvement was reported for Somalia (though it still has one of the

lowest literacy rates in the region), Madagascar, Comoros, Djibouti and Kenya; while negative growth rates were reported for Uganda, the United Republic of Tanzania, Zambia and Zimbabwe; and the remaining countries reported marginal improvements.

The other notable feature of the data contained in table XI.1A is the lower literacy rate of females than that of males. Nevertheless, considerable progress had been made, particularly from the 1970s to the middle of the 1980s, and appreciable further gains are projected for sub-Saharan Africa. The signs of such a trend were already evident in most countries of that grouping during the period 1985-1990, as the table shows. Owing to population growth, however, the absolute numbers of the illiterate would increase: it is estimated that in the year 2000 some 147 million people in sub-Saharan Africa will be illiterate, compared to 139 million in 1990. The overall illiteracy rate in 1985 was 59.1 per cent and the estimate for 1990 was 52.7 per cent. The corresponding percentages for the whole world were 29.9 and 26.9 respectively. A sharp decline to 40.3 per cent in sub-Saharan Africa is projected for the year 2000²³. Adult illiterates would then constitute just 16 per cent of an estimated 918 million in the developing world²⁴.

It is clear from the foregoing remarks and tables XI.1 and XI.1A that by and large the majority of the African population is still illiterate. That fact raises the question of the equitable distribution of social development opportunities in the region. The main purpose of promoting universal literacy is to improve the capacity of people to absorb information. The slow improvement in that aspect of the development of human resources has serious implications for the outcome of APPER. If the short- and medium-term goals of APPER are to be realized before the end of this century, more attention must be paid to it and to other factors affecting the quality and performance of the human resources available in the region.

2. Formal Education

Table XI.2 below shows that school enrolments increased moderately (8.5 per cent, at all levels of education combined) during the period 1985-1988.

The higher the educational level, the more rapid the growth in enrolment, which suggests a greater emphasis on and attention to post-primary education. That could be due to past success in achieving the

23 UNESCO, *Basic Education and Literacy: World Statistical Indicators* (Paris, 1990), table 24: 41

24 "Adult" in this context is assumed to refer to persons aged 15 years and above, the age group to which literacy data given by UNESCO relate.

Table XI.2
Gross enrolment in African developing countries by
level of education 1985-1988*
(Thousands)

	Level I	Level II	Level III	Total
1985	65872	19040	1886	86799
1987	67430	19924	2065	89419
1988	69747	20350	2115	92213
Percentage growth:				
1985-1988	5.6	6.9	12.1	8.5

Sources: UNESCO, Statistical Yearbook, 1990 (Paris, 1991)
* Gross enrolment is the total numbers enrolled, irrespective of age, in a given level of education — primary (I), secondary (II) or tertiary (III).

enrolment of a higher proportion of the population in the relevant age group in the case of level I than in the case of the other levels. The ratios of enrolment to relevant population group shown in table XI.3 below lend support to that hypothesis.

Table XI.3
Estimated gross enrolment ratios by level of education,
1980-1990*
(Percentage)

	Level I	Level II	Level III
1980	79.5	23.0	3.5
1985	75.2	28.4	4.2
1990	79.7	32.4	4.9

Sources: UNESCO, Statistical Yearbook, 1990 (Paris, 1991)
* The ratio of the numbers enrolled, irrespective of age, in a given level of education — primary (I), secondary (II) or tertiary (III) — to the population in the age group relevant to that level.

In contrast, the other developing regions reported for the year 1990 an enrolment ratio of 99.8 per cent at the first level, 44.9 per cent at the second, and 8.3 per cent at the third²⁵.

Although the proportion of women in school enrolments in developing Africa had increased between 1985 and 1988, the growth was essentially at the first level and it remained below one half at that level. At second and third levels the proportion actually declined. Some countries in the region are trying to increase female enrolment at the second level in order to make possible an increase at the tertiary level. For example, Zambia introduced a lower cut-off point for girls than for boys in the primary-level examinations. That policy of positive discrimination in their favour was aimed at increasing the proportion of girls at the

Table XI.4
Ratio of female to total by level of education, 1980-1990*
(Percentage)

	Level I	Level II	Level III
1985	44	38.0	27
1987	44	39	28
1988	45	39	29

Sources: UNESCO, Statistical Yearbook, 1990 (Paris, 1990).

Greater participation of females in the education process is not just a matter of providing them with equal opportunities for social development: it is a key to development in general. The available evidence shows that the higher the level of women's education the lower the rates of infant mortality and fertility. The findings of various studies suggest that improving the level of education of women can improve the health and life expectancy of children. Failure to raise women's level of education closer to that of men detracts from the social benefits of raising the level enjoyed by men²⁶. It has been further noted that better-educated women are more informed about the value of health care and personal hygiene. They tend to be less affected by the absence of community health programmes and tend to make greater use of such facilities when they are available.

(a) Primary school enrolment

Recent data on school enrolment ratios are not available at the subregional level — not even for most countries of the region, as may be seen from table XI.2A annexed to this chapter. It is therefore difficult to say whether subregional gross ratios of primary school enrolment have improved or worsened since 1985, the year for which data for most countries were last reported. However, in countries for which comparisons can be made, there were not significant improvements in that ratio between 1985 and 1988. The ratios were markedly lower in West Africa than in East and southern Africa. A few countries in the region — for example, Botswana, Cape Verde, Lesotho, Mauritius, Swaziland and Tunisia — reported ratios of over 100 per cent in 1985. However, the ratio appears to have declined in a few of those countries in 1988. It may well be that the provision of basic education is being curtailed in many countries of the region as the growth of their economies slows and Governments are forced to cut down on social services. Nevertheless,

25 *Ibid.*

26 World Bank, World Development Report 1991 (Oxford University Press, June 1991).

sub-Saharan Africa ought still to feel the need to make a considerable effort to achieve universal primary education by the end of the century.

(b) Secondary school enrolment

Due to incomplete data, it is likewise difficult to comment on trends in the secondary level of education in recent years. However, the trend in the few countries that reported comparative data seems to suggest that gross enrolment ratios were higher in 1988 than in 1985 (see table XI.2A). Subregionally, the largest improvements were reported in North Africa, by Algeria, Morocco and Tunisia. Moderate gains were reported in West Africa by the Niger and Senegal — offset, however, by deterioration in Benin, the Gambia, Ghana and Nigeria. Similarly, moderate improvements were also reported in East and southern Africa by Djibouti, Ethiopia, Kenya, Mauritius and Swaziland.

(c) Third level of education

It should be remarked at the outset that gross enrolment ratios at the third level of education have remained exceedingly low in all countries except for those in North Africa (see table XI.2A) — less than 1 per cent of the related population age group in most cases. Due to the paucity of recent comparative data, it is again not possible to discern definitive trends. It is worth noting that Mauritius reported a doubling of the ratio between 1985 and 1988.

(d) Public expenditure on education

Public expenditure on education as a percentage of GNP declined in sub-Saharan Africa as a whole in the early 1980s but increased in the mid-1980s (see table XI.5 below, which also shows comparative data for other regions of the world).

However, the growth of public expenditure on education, measured at constant prices, was slower in the 1980s than the 1970s in both developed and developing countries. Among developing regions, the sharpest falls in the median growth rates were recorded in sub-Saharan Africa and in Latin America and the Caribbean. During the 1980s, nine out of 37 sub-Saharan African countries had negative growth rates.

The median share of education in total government expenditure in sub-Saharan Africa declined between 1980 and 1985 by 14.4 per cent but increased

Table XI.5
Public expenditure on education as a percentage of GNP, 1975-1987

	1975	1980	1985	1986	1987
World total	5.8	5.5	5.6	5.6	5.6
Sub-Saharan Africa	3.9	4.8	4.4	4.8	4.9
Arab States	5.9	4.4	6.2	6.7	6.6
Latin America and the Caribbean	3.6	3.9	4.1	4.3	4.3
Developed countries	6.3	6	6	5.9	5.9

Sources: UNESCO, Basic Education and Literacy: World Statistical Indicators (Paris, 1990).

between 1985 and 1987 by 17 per cent. Current expenditure in sub-Saharan Africa per pupil enrolled at each level of education is shown for the years 1980 and 1987 in table XI.6 below.

Table XI.6
Public expenditure per pupil by level of education, 1980 and 1987 (dollars)

	Level I	Level II	Level III
1980	5.8	5.5	5.6
1987	3.9	4.8	4.4

Source: UNESCO, Basic Education and Literacy: World Statistical Indicators (Paris, 1990).

It is interesting to note (see table XI.7 below) that the ratio of current expenditure per pupil at each level of education to per capita GNP was higher in sub-Saharan Africa than in other developing regions. (Level I is combined with the pre-primary level in the table since the data for separate calculations are not available.) The higher ratio may be due to the fact that education in sub-Saharan Africa is financed almost exclusively through public funds, whereas in other regions of the world it is financed through private as well as public funds. It is only very recently (around 1989) that some African Governments have introduced user charges (as part of structural adjustment policies and programmes) for social services such as education. Consequently, the ratio of public expenditure per pupil to per capita GNP may have declined — though ECA secretariat does not have more recent data to support that assertion. Public expenditure on education per inhabitant in sub-Saharan Africa declined between 1980 and 1988 from \$41 to \$30²⁷. In other developing regions, however, particularly in Asia, that ratio increased

27 UNESCO, *Basic Education Literacy*, op. cit.

during those years. The implications of the declining per capita expenditure on education in sub-Saharan Africa should be sought by looking into what happened to the quality of education. Reduced budgetary allocations combined with population pressures had disastrous effects on the quality and extent of participation in the educational sector. It is now doubtful whether the majority of the countries can attain the objective of universal primary education by the year 2000.

It should be reiterated that female education continued

Table XI.7
Ratio of public current expenditure per pupil to per capita GNP, by level of education and by region, 1980 and 1987

	Year	All levels	Pre-primary & level I	Level II	Level III
Sub-Saharan Africa	1980	0.32	0.17	0.72	8.5
	1987	0.36	0.19	0.7	7.4
Latin America and the Caribbean	1980	0.14	0.14	0.09	0.6
	1987	0.16	0.14	0.09	0.5
Eastern Asia	1980	0.24	0.15	0.19	0.6
	1987	0.19	0.12	0.14	0.6
Southern Asia	1980	0.24	0.15	0.19	0.6
	1987	0.19	0.12	0.14	0.6

Source: UNESCO, Basic Education and Literacy: World Statistical Indicators (Paris, 1990).

to lag behind that of males. In 1990, the ratio of female to male enrolment indicated the existence of major disparities, particularly at the secondary and tertiary levels. The low priority given to female education by parents persisted, since families under severe economic and financial pressure were more likely to withdraw female than male children from school. As stated earlier, the provision of opportunities for females — and at all educational levels — is a necessary condition for the socio-economic transformation and development of African developing countries. It is important, therefore, to afford girls and women improved opportunity to profit from the facilities of the education sector.

C. Employment

1. The Economic Background

For most of the developing world and for the African region in particular the 1980s have been disappointing in terms of social advancement and economic growth. Indeed, the rate of growth of per capita GDP in sub-Saharan Africa at the end of the decade was negative. Investment in the region fell in real per capita terms by approximately 50 per cent between 1980 and 1989. The ratio of investment to GDP in 1989 remained the lowest among the developing regions: 15 per cent, compared to 21 per cent in Latin America and the Caribbean; to 22 per cent in South Asia; and to 31 per cent in East Asia²⁸. The aggregate output of the African region grew by only 2.6 per cent in 1990 compared to 3.3 per cent in 1989²⁹. With the assumed annual population growth of 3 per cent in the region, income per head fell by 0.4 per cent, with all the implications and adverse consequences for social welfare and the employment situation which that implies. External debt in sub-Saharan Africa increased, as a percentage of annual exports of goods and services, from 96.8 in 1980 to 362 in 1989; and as a percentage of GNP it increased from 26.8 to an astounding 96.9. Debt service as a percentage of exports of goods and services increased from 10.9 in 1980 to 22.1 in 1989³⁰.

2. Major Developments in Employment and the Labour Market

Against the background of negative economic growth and economic malaise, the employment situation in the region could not have been encouraging. It was bound to worsen when the labour force grew faster than the economy, which has been the case in sub-Saharan Africa since the early 1980s. Unfortunately, hard data to illustrate the downward trend in employment are difficult to come by. Moreover, the use of such data as are available is limited on account of conceptual differences. Given the paucity and unreliability of data, therefore, it is not possible to present definitive trends in the employment situation during the last decade. However, an attempt is made to discuss recent major developments, drawing on data from the available country studies.

It is useful to begin by sketching the present and probable future size of the economically active

28 World Bank, *op. cit.*

29 ECA, *Economic Report on Africa 1991* (E/ECA/CM.17/2).

30 World Bank, *op. cit.*

population (i.e., the labour force). Table XI.8 below shows data for 1985 and projections to the year 2000, by subregion. The total labour force in the region is estimated to have increased from 214 million in 1985 to 243 million in 1990 or at an average annual rate of 2.7 per cent; and it is projected to increase to 318 million in the year 2000 (at an average annual rate of 3.1 per cent). Trends in the labour force do not necessarily imply a similar trend in employment in any given period of time, on the basis of which conclusions as to unemployment might be drawn.

since 1980³¹. At the same time, the average annual growth of the labour force rose marginally from 2.5 per cent in the 1970s to 2.6 per cent in the 1980s. Wage employment in the industrial sector likewise remained static or increased only marginally in the mid-1980s. It appears that up to the mid-1980s wage employment in the formal sector did not fall dramatically, despite the declining rate of economic growth. That may be attributed to the fact that wage employment in the civil service sector in most African countries constitutes a significant proportion of the

Table XI.8
Evolution of the economically active population of developing Africa by subregion, 1985-2000
(Thousands)

Subregion	1985			1990			2000		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
North	34510	29524	9986	40016	33868	6148	53973	44620	9354
West	67708	42575	25133	76726	48952	27774	100567	65654	34906
Central	23851	15196	8655	26428	17108	9320	33374	22030	11344
East	75030	43238	31643	85082	50019	35064	111366	67536	43830
Southern	12693	8223	4470	14532	9349	5183	19048	12148	6901
Region	213792	138905	74886	242784	159296	83488	318322	211987	106310

Source: ILO, *Economically Active Population: Estimates and Projections, 1950-2025*, vol. II (Geneva, 1986).

Employment data for the region — which in practice means data on formal employment — are neither complete nor up to date. Table XI.9 below covers the few countries for which data are available and shows that formal wage employment has virtually stagnated

total. Apparently, up to quite recently, employment in the civil service sector has not been reduced despite declining economic growth in a number of African countries.

31 ILO, *Jobs and Skills Programme for Africa (JASPA)*, *African Employment Report 1988*.

Table XI.9
Wage employment in selected countries
(Thousands)

	Total			Industrial *		
	1975	1980	1985	1975	1980	1985
Benin	33.1	66.2	80.8	6.3	14.6	15.3
Botswana	57.3	83.4	117.2	17.9	27.6	31
Burundi	28.5	38.2	44.7	6	10.7	14.2
Cote d'Ivoire	340.9	470.2	415.5	55	73.5	65.9
Gambia	18.8	29.6	24.1	8.3	9.8	5.6
Kenya	819.1	1005.8	1174.4	152.4	217	231.2
Malawi	276.8	370.4	3994.6	62.8	77.1	71.1
Mauritius	168.6	197.1	209.5	30.9	48.4	71.9
Niger	20.5	26	22.5	123.3	17.5	12.6
Seychelles	13.8	17.9	18.2	3.2	4.5	3.4
Sierra Leone	61.3	69.9	69.4	20.1	23.9	25.8
Swaziland	64.4	75.1	72.8	15.8	19.1	143.4
Zambia	393.5	379.3	361.5	186	162.6	276.4
Zimbabwe	1050.2	1009.9	1039.4	286.3	274.5	..
Total	3346.8	3839	4044.6	863.3	981.1	985.8

Source: ILO, JASPA, African Employment Report, 1988, table 1.7

* Industrial wage employment refers to employment generated through production of goods or commodities; while total wage employment includes that in the services sector as well.

The reduction in output growth was accompanied by a considerable fall in real wages (see table XI.3A annexed to this chapter). For example, of 18 countries for which data on real wages in the mid-1980s were cited in the JASPA report³², only two — Burundi and Seychelles — reported increases, while Sierra Leone, Somalia, the Sudan, the United Republic of Tanzania and Zambia reported considerable falls. Only two small countries — Mauritius and Swaziland — reported annual declines of less than 3 per cent.

The fall in real earnings in the modern sector, particularly in the public sector, forced wage employees to supplement their incomes through other sources, including peri-urban farming and informal-sector activities. Widespread moonlighting and holding multiple jobs have indeed become common among wage earners in the modern sector. Evidence from Côte d'Ivoire shows that moonlighting was more common among civil servants than among

private-sector wage earners³³. The findings of a recent study on structural adjustments and the survival strategies of university professors in Zambia showed that moonlighting and job multiplicity, ranging from consultancies to informal sector-activities, had become the order of the day³⁴. That does not imply that employment opportunities were abundant: it merely illustrates the survival strategies of even the so-called highly paid public-service workers when their real wages were so drastically reduced that it became necessary for them to supplement their incomes through secondary jobs.

In view of the fact that economic growth in the region in the latter half of the 1980s was negative, it has to be assumed that the employment situation took a turn for the worse. During that period a number of Governments in sub-Saharan Africa were forced to retrench the cost of public services, laying off thousands of their workers as part of the structural

32 *Ibid.*

33 J. Vander Gaag *et al.*, "Wage differentials and moonlighting by civil servants: Evidence from Côte d'Ivoire and Peru.", *The World Bank Economic Review*, vol.3, No. 1, 1989, pp. 67-95.

34 A. Mfune, "Structural adjustments and academic staff at the University of Zambia, Lusaka". Paper presented at a workshop on the impact of structural adjustments (Lusaka, mimeo).

adjustment programmes. The numbers involved in that decade included 45,000 in Ghana, 40,000 in Guinea, 27,000 in the United Republic of Tanzania and 16,000 in Cameroon³⁵. In some cases it was found politically expedient to freeze new recruitment by not filling vacant posts in the public service rather than resorting to retrenchment and lay-offs on a large scale. The freeze on new recruitment resulted not merely in a diminution of the numbers employed but also in a reduction in the delivery of social services, e.g. education and health services.

The public sector in most African countries has been the dominant employer, accounting for 50 per cent or more of total wage employment. However, since the mid-1980s it has been unable to sustain the high rates of labour intake which prevailed in the 1970s and early 1980s. Its importance as the largest employer and the employer of last resort diminished, especially in the latter part of the 1980s. Wage employment in the formal sector in the region as a whole has been declining since 1980. Data on the employed labour force for 36 countries (representing 95 per cent of the regional labour force) in 1980 showed that less than 10 per cent was employed in the formal sector, with the remainder in the rural sector (approximately 70 per cent) and the urban informal sector (about 20 per cent)³⁶. Because of the slower growth in wage employment over the last decade, one may assume that it probably does not account for more than 8 per cent of the current labour force of the region. The implication is that unemployment has been on the increase during the last decade.

Notwithstanding the limitations of the data, the employment situation of the 1980s in the region may be characterized by the following features:

- (a) Declining wage employment;
- (b) Loss of real wages;
- (c) The declining importance of the modern sector in the absorption of the regional labour force;
- (d) Improved rural employment prospects in the region due to greater incentives, e.g., increases in producer prices. Consequently, the rural

sector has been the major one in absorbing labour;

- (e) The importance of the informal sector as a "sponge" for labour: it is estimated to absorb some 15 per cent of the regional labour force and about 60 per cent of the urban labour force;
- (f) Rising unemployment, which has assumed serious proportions and is most prevalent among the young of both sexes and women generally.

3. Employment Projections

The labour force of sub-Saharan Africa in 1990 was estimated at approximately 200 million and is projected to increase at 3.3 per cent per annum — a slightly higher rate than the population (3.2 per cent) because of the growth of female participation in the labour force³⁷. On the assumption that 67 per cent of the population in urban areas and 80 per cent in rural areas will be economically active, the projections for the labour force in sub-Saharan Africa in the year 2000 total 274 million. Table XI.10 below shows the constituent elements.

Table XI.10
Projections of employment and unemployment in sub-Saharan Africa in the year 2000

	Base Year 1990		Projected annual rate of growth (percentage)	Projected annual rate of growth		Year 2000	
	PE	Percent		Productivity	Employment	Millions Employed	Percent
Employed							
Rural sector	143.6	72	4	1.5	2.5	183.8	67
Informal sector	30.5	15	4.5	1	3.5	43.2	16
Modern sector	15.9	8	3	1	2	19.4	7
Unemployed	9	5	..			27.9	10

Employment of the labour force is projected to increase at 2.4 per cent per annum (see table). Unless the economic growth rate were to rise to 5 per cent per annum, the increment in the labour force would not be fully absorbed, i.e., the employment situation would deteriorate during the 1990s. According to the above projections made by JASPA, the rate of expansion in employment is expected to be greatest in

35 ILO, JASPA, African Employment Report, 1990 (Addis Ababa, 1991).

36 ILO, JASPA, *op. cit.*

37 ILO, JASPA, African Employment Report 1990, *op. cit.*

the informal sector (3.5 per cent), followed by the rural sector (2.5 per cent). Thus, the two most important labour "sponges" during the 1990s would continue to be those two sectors, which would generate some 71 per cent and 23 per cent, respectively, of all additional productive jobs created in the decade.

The modern sector is likely to expand annually by no more than 2 per cent, employing 7.8 per cent of the labour force during the 1990s, while over the same period a staggering 83-84 per cent would be employed in the rural and informal sectors. Overt unemployment is estimated at 10 per cent of the projected labour force by the year 2000. The low rate of labour absorption projected for the modern (formal) sector indicates a gloomy view of the prospects for industrial development and development in general in sub-Saharan Africa. It is important for Government and peoples to take action which will prove those projections too pessimistic, creating an environment conducive to the promotion of all the sectors.

In absolute terms, the subregion needs to generate some 75 million new jobs in order to absorb labour force recruits during the 1990s. About 53 million new jobs are expected to be created in the rural and informal sectors, compared to a mere 3.5 million in the formal sector (bringing its total employment to about 19 million). In other words, the formal sector would be further marginalized as a factor in absorbing the growth in the labour force.

4. Unemployment

In a situation where the labour force grows faster than national output a sharp increase in unemployment is inevitable (unless productivity plummets, which brings other disadvantages). Unemployment is most prevalent in urban areas, where it is estimated that the rate will increase from 18 per cent in the mid-1980s to 31 per cent in the 1990s³⁸. Youths, especially those between the ages of 15 and 20 years, are particularly vulnerable to unemployment, even when they have some education, because of their lack of experience of wage employment and their lack of skills, of capital and of related business inputs for self-employment.

Unemployment among school leavers has become critical in the subregion. Among primary school leavers, 50-80 per cent are unable to proceed to the second level of education because of the limited school places. Their prospects for wage employment or self-employment are extremely limited. Most of them are left without much hope or prospects of engaging

in productive employment. They constitute the bulk of the unemployed youth, especially in urban areas.

The most vulnerable groups among the unemployed, however, are girls and women. Their chances of finding a job in the formal sector are two thirds those of their male counterparts. The ideology of gender-stereotyping — that work is the prerogative of males — tends to militate against females. Those women who must work have no choice but to seek refuge in the informal sector, where they barely eke out a living.

The JASPA projections put the total unemployed population at about 28 million in the year 2000 compared to 9 million in 1990 (see table XI.10). Those figures constitute the overt unemployment, i.e., those people who do not apparently carry out any economic activity, are seeking work and are available for work. The category does not include the underemployed and therefore it masks the actual extent of unemployment. Work sharing, especially in the informal sector, converts unemployment into underemployment. Official statistics count the underemployed as employed. The situation of underemployment inevitably precludes rises in productivity and leads to an aggravation of poverty.

To sum up, the economic crisis of the 1980s had a devastating impact on the labour market in sub-Saharan Africa and there is a danger that worse lies ahead in the 1990s. The 1980s witnessed a process of "informalization" of the labour markets, i.e., the majority of the labour force now depends on the informal sector (the agricultural and urban parts of which have different characteristics) for income supplementation as well as for principal source of income. The casualization of employment has also increased, while retrenchment has reduced employment security.

Employment creation represents one of the most efficient ways of distributing incomes in developing countries. The first and necessary condition for reducing unemployment is to achieve a growth rate of the economy higher than that of the labour force. However, that will not by itself be a sufficient condition for employment growth: it must be complemented by social development in general, i.e., by equity, efficiency, availability of employment and alleviation of poverty. In the past, too much emphasis was placed on achieving a certain rate of economic growth, budgetary balance, etc., while generally overlooking the implications for social development, including

38 *Ibid.*

equitable participation in gainful employment. The decade of the 1990s presents both a challenge and an opportunity: the fundamental objective to be achieved is growth with equity through a more democratic and participatory approach.

D. Health

Aggregate data relating to health are, in general, available for sub-Saharan Africa rather than the region as a whole. In this Survey, therefore, North Africa is excluded from statements of the aggregate situation. However, where possible data for individual countries of the North African subregion are included in the analysis.

Though considerable progress in human development was achieved in developing Africa up to the end of 1970s, a marked deterioration in the health status of the population occurred during the 1980s. As a result, the disparities in health between the populations of the region and those of the industrialized world increased. Some vital statistics quoted in a recent report by UNDP illustrate those disparities. Although life expectancy at birth in sub-Saharan Africa increased from 40 years in 1960 to about 52 years in 1990, it is lower there than anywhere else in the world —by 11 years compared to other developing regions and by almost 13 years compared to the grouping of industrialized countries³⁹. However, life expectancy in four countries in North Africa was higher in 1990 by between 8 and 14 years than in sub-Saharan Africa.

Despite recent improvements, the under-five mortality rate per 1,000 live births (U5MR) of 179 compares unfavourably with 57 for South-East Asia and 72 or Latin America and the Caribbean⁴⁰. In some countries, a quarter or more of the children die before the age of five: examples are: Angola, Mali and Mozambique, where U5MRs per 1,000 in 1989 were 292, 287 and 297, respectively. The comparable rate was only 18 in the advanced industrial countries⁴¹.

In 1990, the maternal mortality rate per 100,000 live births (MMR) averaged 640 in the region. That was

more than 26 times the MMR in the industrialized world for the same year, which was reported at 24. Subregionally, MMR ranged from 500 in North Africa to 700 in West Africa.

Table XI.11 below illustrates the North-South gap in life expectancy at birth and in U5MR. The data take the form of index numbers, the situation in any given year in the industrial countries being taken as 100. The closer any index number is to 100, the smaller the gap.

Table XI.11
Index numbers of life expectancy at birth and rate of mortality under 5 years
(Index for industrial countries=100)

	Life Expectancy		Under 5 mortality rate	
	1960	1990	1966	1986
All developing countries	67	84	20	16
Least developed countries	56	68	16	9
Sub-Saharan Africa	58	70	16	11
Source: UNDP, Human Development Report 1991 (New York, 1991).				

In sub-Saharan Africa, health services, safe water and sanitation services are concentrated by and large in urban areas. The availability of data is such, however, that full comparisons between urban and rural areas, as well as between sub-Saharan Africa and groupings outside Africa, cannot be made for a later period than that to which table XI.12 below relates, namely, 1985-1988. In sub-Saharan Africa during that period, access to safe, clean and drinkable water, a fundamental health requirement, was available to only 40 per cent of the population. That was the lowest rate in the developing world, where the average was 62 per cent⁴²; and it may be noted that 74 per cent of the urban population but only 26 per cent of the rural population enjoyed that service.

As may be seen from the table, the disparity of access to services in sub-Saharan Africa is worse for water

39 UNDP, Human Development Report, 1991 (New York, 1991).

40 Ibid.

41 UNICEF, *The State of the World's Children, 1991* (New York, Oxford University Press, 1991).

42 UNDP, *op. cit.*

Table XI.12
Access to health, water and sanitation services by economic groupings, 1985-1988: the rural-urban gaps a/
(Percentage)

	Ratio of rural to total population in 1990	Rural access to services in 1985-1988			Urban access to services in 1985-1988			Access ratio of rural to urban services		
		Health	Water	Sanitation	Health	Water	Sanitation	Health	Water	Sanitation
All developing countries	63	44	50	27	88	81	60	50	62	45
Least developed countries	80	35	27	17	90	50	50	39	55	34
Sub-Saharan Africa	69	37	26	18	72	74	60	51	35	31

Source: UNDP, Human Development Report 1991 (New York, 1991)

and worse still for sanitation than for health: the rural population fared half as well as the urban in regard to health, little more than a third as well in regard to water and under a third as well for sanitation. The gap for water is very markedly greater in sub-Saharan Africa than the average for all developing countries or for the least developed countries. Similarly, the gap for sanitation services is also greater than the average for all developing countries, though somewhat less than in least developed countries.

Table XI.4A in the annex to this chapter includes country data on the access of the population to health services and safe water and the variation between the rural and urban parts. It will be noted that the data are incomplete in some cases and indeed that no data at all are available for about one quarter of the countries in the region. However, where the information is available, it is clear that there are wide-ranging disparities between the situations of the urban and rural populations. In most of sub-Saharan Africa, less than half the rural population — in some countries, such as Somalia and Zaire, less than one-fifth — has access to health services. As to safe water supplies, in some countries less than 20 per cent of the population have access — for example, Mozambique (16 per cent); Mali

'17 per cent) and Côte d'Ivoire (19 per cent). In some other countries, however, between half and three quarters of the population have access. Only two countries, Mauritius and the Libyan Arab Jamahiriya, reported virtually universal access.

Table XI.13 below shows that, notwithstanding remarkable progress made in the decade of the 1980s in the immunization of infants under 1 year old, in two thirds of the 42 countries in the region for which data are available coverage against diphtheria, pertussis and tetanus (DPT) and against poliomyelitis and measles was less than 50 per cent. Only 12 of the countries immunized as high a proportion as three quarters of the children under 1 year old against the five or six major diseases which kill or disable. Oral rehydration therapy (ORT) coverage was less than 25 per cent during the year 1988-89. Those data suggest that most Governments in the region have been slow in their efforts in the field of public health care (PHC). Hopes for assuring better health in the 1990s rest on the full implementation of PHC programmes which emphasize safe water, nutrition, immunization, ORT and family planning.

Table XI.13
Immunization of the infant population and pregnant women in selected African countries against major killer or disabling diseases, 1981 and 1988-1989
(Percentage)

Number of countries in developing Africa	One-year-old children fully immunized								Pregnant women		O R T use rate 1987-1988
	tuberculosis		D T P		Poliomyelitis		Measles		Tetanus		
	1981	1988/89	1981	1988/89	1981	1988/89	1981	1988/89	1981	1988/89	
28	24	74	14	47	8	49	23	48	5	32	23
12	61	81	42	76	42	78	33	69	10	41	39
2	65	92	52	87	51	89	46	82	6	54	30

Source: UNICEF, The State of the World's Children 1991 (New York, Oxford University Press, 1991)

E. Malnutrition

Malnutrition increased in developing Africa in consequence of the failure of food production to keep pace with population growth, recurring famine, drought and civil strife. The degree of dependence on imported food rose dramatically to 11 per cent of total supplies in 1984-1986. FAO estimated import requirements in 1990/1991 at 10 million tons, of which 5.1 million tons or 50 per cent would be in the form of aid⁴³.

In 1990, out of 177 million malnourished children in the world, some 30 million were African. If one looks only at the population of malnourished children under the age of 5 years, the African ones constituted 26 per cent of the world total⁴⁴. In that year, 79 million or 26.6 per cent of African children were said to be under weight, 35.3 per cent stunted and 10.2 per cent wasting⁴⁵.

The daily calorie supply for children in 1984-1986 was 91 per cent of requirements — much the same as in 1965. The comparable figures for industrial countries were 124 in 1965 and 132 in 1985. Malnutrition considerably aggravates many diseases, such as diarrhoea, measles, tetanus, whooping cough and pneumonia, all of which can now be prevented or treated at very low cost, in the absence of malnutrition

F. Conclusion

After a decade of economic decline, the social situation of African peoples has deteriorated. Living standards have fallen and inevitably poverty is on the increase, with all its associated ills — such as the spread of malnutrition, which now affects almost 50 per cent of

children in many countries. With the growth rate of the economies overtaken by that of populations, the resources devoted to social services have failed to keep pace with social needs. That has produced shortages of basic supplies at schools, where a damaging fall in standards has occurred. Health services have likewise deteriorated: shortages, the disrepair of facilities, the collapse of standards of hygiene, etc., are commonly observed in most countries of the region. The mounting unemployment, especially among the young people, presents a serious social problem, as employment opportunities fail to keep pace with the growing labour force. The lack of employment and income-generating opportunities is exacerbating the conditions of poverty in most countries.

To deal with those formidable problems, a number of development programmes and strategies have recently been proposed by ECA. Their aim is to help Governments to formulate national policies that would accelerate socio-economic transformation. Among the programmes are: the African Alternative Framework to Structural Adjustment Programmes for Socio-economic Recovery and Transformation (AAF-SAP); the African Charter for Social Action (both in 1989); and the African Charter for Popular Participation in Development (1990)⁴⁶. All of them emphasize the central place which social development must occupy if long-term growth and development, especially in relation to the provision of such basic needs as education, food, health and employment, are to be achieved. There is also renewed emphasis on the need to evolve development strategies that are generated from within Africa. The 1990s must be the decade in which those strategies are implemented, to enable the region to transcend the current stagnation and decline. Annex

43 FAO, Food Supply Situation and Crop Prospects in Sub-Sahara Africa. Special Report (Rome: FAO, June 1991).

44 UNICEF, op. cit.

45 *Ibid.*

46 ECA, African Alternative Framework to Structural Adjustment Programmes for Socio-economic Recovery and Transformation, 1990 (E/ECA/CM.15/6/Rev.3); ECA/OAU, African Charter for Social Action, 1990 ECA/OAU/AMSA.V/25; and ECA, African Charter for Popular Participation in Development, 1990.

Table XI.1A
Adult literacy rates in developing Africa, 1985 and estimates for 1990
(Percentage)

	1985			1990		
	Male	Female	Total	Male	Female	Total
North Africa						
Algeria	63	37	50	70	46	57
Egypt	59	30	45	63	34	48
Libyan Arab Jamahiriya	81	50	67	75	50	64
Morocco	45	22	33	61	38	50
Sudan	50	20	34	43	12	27
Tunisia	68	41	54	74	56	65
West Africa						
Benin	37	16	26	32	16	23
Burkina faso	21	6	14	28	9	18
Cape Verde	61	39	47	..	..	67
Cote d'Ivoire	53	31	43	67	40	54
Gambia	36	15	25	39	16	27
Ghana	64	43	53	70	51	59
Guinea	40	17	28	35	14	24
Guinea Bissau	46	17	31	50	24	37
Liberia	47	23	35	50	29	40
Mali	23	11	17	41	24	32
Mauritania	38	17	28	47	21	34
Niger	19	9	14	40	17	28
Nigeria	54	32	42	62	40	51
Senegal	37	19	28	52	25	38
Sierra Leone	38	21	29	31	11	21
Togo	54	29	41	56	31	43
Central Africa						
Burundi	43	48	45	61	40	50
Cameroon	68	45	56	66	43	54
Central African Republic	53	29	40	52	25	38
Chad	41	11	25	42	18	30
Congo	71	55	63	70	44	57
Gabon	70	53	62	74	49	61
Rwanda	61	33	47	64	37	50
Sao tome and Principe	76	47	60	..	..	..
Zaire	79	45	61	84	61	72
East and Southern Africa						
Angola	49	33	41	56	29	42
Botswana	73	62	72	84	65	74
Comoros	49	35	42	58	41	50
Djibouti	49	35	42	58	41	50
Ethiopia	77	38	61	..	..	64
Kenya	70	49	59	80	59	69
Lesotho	62	85	74	63	86	75
Madagascar	74	62	68	88	73	80
Malawi	52	31	41	53	32	42
Mauritius	89	77	83	90	79	84

Mozambique	55	23	38	45	21	43
Seychelles	74	69	72	..	..	..
Somalia	18	7	12	36	14	24
Swaziland	70	66	68	..	..	..
Uganda	82	73	77	62	35	48
United Republic of Tanzania	70	45	57	..	..	..
Zambia	84	67	75	81	65	73
Zimbabwe	82	67	74	74	60	67
Regional total	59	36	47	..	..	..
Sources: ECA, Survey of Economic and Social Conditions in Africa, 1986-1987 (E/ECA/CM.14/4); and adaptations by ECA Secretariat of UNESCO Statistical Yearbook 1990 (Paris, 1990), table 1.						

Table XI.2A
Gross enrolment ratios by level of education, 1985 and 1988
(Percentage)

	Level I		Level II		Level III	
	1985	1988	1985	1988	1985	1988
North Africa						
Algeria	93	96	51	62	8.8	9.1
Egypt	87	..	..	..	20.2	..
Morocco	78	67	34	36	7.8	..
Sudan	50	..	20	..	2.0	..
Tunisia	116	113	39	44	5.7	7.0
West Africa						
Benin	65	63	17	..	2.7	..
Burkina faso	29	..	5	..	1.7	..
Cape Verde	109	..	13	..	..	..
Gambia	68	61	17	..	..	..
Ghana	76	73	40	39	1.5	..
Guinea	30	30	10	9	1.7	1.2
Mali	23	..	7	..	1.0	..
Mauritania	49	..	15	..	3.0	..
Niger	28	30	6	7	..	0.7
Nigeria	77	66	..	23	..	..
Senegal	57	59	14	16	2.4	3.0
Togo	95	..	21	..	2.2	..
Central Africa						
Burundi	53	..	4	..	0.7	..
Cameroon	108	..	24	..	2.4	..
Central African Republic	77	67	16	11	1.2	1.3
Rwanda	63	..	6	..	0.4	..
East and Southern Africa						
Botswana	108	..	30	..	2.2	..
Djibouti	43	46	13	15	..	..
Ethiopia	34	36	13	15	0.9	0.9
Kenya	98	93	21	23	1.3	..
Lesotho	113	..	23	..	..	..
Madagascar	..	97	..	19	..	3.7
Malawi	62	72	4	4	0.6	..
Mauritius	105	105	51	53	0.9	1.8
Mozambique	86	..	7	..	0.1	..
Somalia	15	..	10	..	2.9	..
Swaziland	107	105	42	44	3.7	..
Uganda	70	..	10	..	0.8	..

Source: UNESCO, Statistical Yearbook, 1990 (Paris, 1990).

Table XI.3A
Index numbers of real wages in selected African countries
(1980=100)

	Coverage	Year	Index	Annual change
Botswana	Pub	1984	85.3	-3.9
Burundi	Nag	1986	111.6	1.8
Cape Verde	Pub	1984	71.7	-8.0
Ethiopia	Civ	1984	84.1	-4.2
Gambia	Mod	1984	80.5	-5.3
Kenya	Nag	1986	78.8	-3.9
Malawi	Nag	1985	72.2	-6.3
Mauritania	Civ	1984	76.4	-6.5
Mauritius	Nag	1986	93.7	-1.1
Senegal	Civ	1985	70.0	-6.9
Seychelles	Nag	1985	110.6	2.0
Sierra Leone	Nag	1986	25.5	-20.6
Somalia	Civ	1986	28.4	-18.9
Sudan	Civ	1985	52.2	-12.2
Swaziland	Nag	1985	87.2	-2.7
United Republic of Tanzania	Nag	1984	46.0	-14.4
Zambia	Nag	1984	63.7	-10.7
Zimbabwe	Nag	1984	88.9	-2.9
Average		1985	73.7	-6.0

Source: ILO, JASPA, African Employment Report, 1988 (Addis Ababa, 1989).

Pub - Public sector

Nag - Non-agricultural sector

Civ - Civil service sector

Mod - Modern sector

Table XI.4A
Access of population, rural and urban, to safe water and health services in selected African countries, 1985-1988
(Percentage)

	Access to safe water			Access to health services		
	Total	Urban	Rural	Total	Urban	Rural
North Africa						
Algeria	68	85	55	88	100	80
Egypt	73	92	56	..	..	..
Libyan Arab Jamahiriya	97	100	90	..	..	..
Morocco	60	100	25	70	100	50
Sudan	21	60	10	51	90	40
Tunisia	68	100	31	90	100	80
West Africa						
Benin	52	80	34	18	..	..
Burkina faso	67	43	69	49	51	48
Cote d'Ivoire	19	30	10	30	61	11
Ghana	56	93	39	60	92	45
Guinea	19	41	12	47	100	40
Liberia	55	100	23	39	50	30
Mali	17	46	10	15	..	..
Mauritania	..	73	..	30	..	..
Niger	47	35	49	41	99	30
Senegal	53	79	38	40	..	..
Sierra Leone	25	68	7	..	..	..
Togo	55	99	41	61	..	..
Central Africa						
Angola	30	87	15	30	..	..
Burundi	26	98	21	61	..	..
Cameroon	33	43	24	41	44	39
Central African Republic	..	13	..	45	..	..
Chad	..	..	..	30	..	..
Congo	21	42	7	83	97	70
Rwanda	50	79	48	27	60	25
Zaire	33	52	21	26	40	17
East and Southern Africa						
Botswana	54	84	46	89	100	85
Ethiopia	16	69	9	46	..	..
Kenya	30	61	21	..	..	..
Lesotho	36	65	30	80	..	..
Madagascar	32	81	17	56		
Malawi	56	97	50	80		
Mauritius	100	100	100	100	100	100
Mozambique	16	38	9	39	100	30
Somalia	34	58	22	27	50	15
Zambia	59	76	41	75	100	50
Zimbabwe	..	..	32	71	100	62

Source: UNICEF, The State of the World's Children, 1991 (Paris, 1991).

STATISTICAL ANNEX

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INTRODUCTION

The statistical annex is intended to provide a cross section of data required for describing the economic and social conditions in Africa up to the year 1989 with special focus on changes that have taken place since 1985. Thus, it provides the background information for some of the estimates given in the text relating to the performance of the African economy in the period 1989 to 1990. The data are limited to the 50^{*} States members of ECA since the report is essentially meant for these countries.

Different data sources have been used in compiling the annex. Usually these are data published by member States, the United Nations and its specialized agencies, the International Bank for Reconstruction and Development (World Bank) and the International Monetary Fund (IMF). Data which are provided to ECA in the form of publications, printouts, magnetic tapes and microfiche are supplemented, where necessary, by estimates made by the ECA Statistics Division.

While the use of harmonized concepts, definitions and classifications is recommended by ECA to national statistical offices, significant variations continue to exist in practice. To the extent possible, the ECA Statistics Division carries out further standardization before releasing data for publication. Strict comparability is, however, often not achievable.

The tables in the annex are grouped as follows: basic indicators which present a summary picture, demographic, social and environmental indicators, national accounts, agriculture, transport and communications, finance and banking and the external sector, which includes international trade data. It is important to note that data on the industrial sector are not included in the Annex because of quality and availability problems. This is mainly due to the fact that most of the information available on industrial production (number of persons employed and index number of production) are both scanty and out of data. Data currently available at

the ECA secretariat refer to only about 15 countries. Important indicators such as industrial output by product, capital formation by type of goods, man-days worked by operatives, raw materials consumed by type and origin, changes in stocks by major components and index number of industrial production are not

consistently compiled by a large number of countries in the region. As the time-lag between the inquiry period and the publication of the results generally varies from two to four years, the latest year for which information is available at ECA is 1988.

The division of Africa into subregions is based mainly on the grouping of countries under the ECA Multinational Programming and Operational Centres (MULPOC). There are five MULPOCs: one for North Africa with headquarters in Tangiers (Morocco), a second for West Africa with headquarters in Niamey (Niger), a third for Central Africa with headquarters in Yaounde (Cameroon), a fourth for the Great Lakes area with headquarters in Gisenyi (Rwanda) and the fifth for Eastern and Southern Africa with headquarters in Lusaka (Zambia). For the presentation of tables in the Annex, the Yaounde and Gisenyi MULPOCs have been combined into one subregion, Central Africa.

Three sections of the Annex need further explanation. These are environment, (tables 6, 7), national accounts (tables 8-18) and international trade (tables 28-32).

Environmental tables are derived from FAO data.

LAND USE: Definitions used by reporting countries vary considerably and items classified under the same category often relate to greatly differing kinds of land.

1. Arable land refers to land under temporary crops (double-cropped areas are counted only once), temporary meadows for mowing or pasture, land under market and kitchen gardens (including cultivation under glass), and land temporarily fallow (less than five years). The abandoned land resulting from shifting cultivation is not included in this category.
2. Land under permanent crops refers to land cultivated with crops that occupy the land for long periods and need not be replanted after each harvest, such as cocoa, coffee and rubber; it includes land under shrubs, fruit trees, nut trees and vines, but excludes land under trees grown for wood or timber.
3. Permanent meadows and pastures refers to land used permanently (five years or more) for herbaceous forage crops, either cultivated or growing wild (wild prairie or grazing land). The dividing line between this category and the

* Not including Namibia.

category "Forests and woodland" is rather indefinite, especially in the case of shrubs, savannah, etc., which may have been reported either under one or the other of these two categories.

4. Forests and woodland refers to land under natural or planted stands of trees, whether productive or not, and includes land from which forests have been cleared but that will be reforested in the foreseeable future. The question of shrub land, savannah, etc., raises the same problem as that in the category "Permanent meadows and pastures".

5. Other land refers to any other land not specifically listed under items 1 through 4. It includes built-on areas, roads, barren land, etc. In Egypt only, rough grazing land is included under other land.

PRODUCTION OF ROUNDWOOD: Figures are given in solid volume of roundwood (or roundwood equivalent) without bark:

Fuelwood + charcoal: The commodities included are fuelwood, coniferous and non-coniferous, and the roundwood equivalent of charcoal, using a factor of 6.0 to convert from weight (t) to solid volume units (m^3).

Fuelwood: Wood in the rough (from trunks, and branches of trees) to be used as fuel for purposes such as cooking, heating or power production. Wood for charcoal, pit kilns and portable ovens is included.

Industrial roundwood: The commodities included are sawlogs and veneer logs, pulpwood and other industrial roundwood.

National accounts data are obtained from country publications, or by ECA staff members on special advisory missions to national statistical offices. However, most of the 1989 estimates are computed by ECA staff members.

The estimation procedures distinguish the following three cases:

1. Countries with GDP estimates in current and constant prices: For these countries, the official country data will be used. Where necessary, minor adjustments have been made to smooth out differences in data coverage in the historical series. Official series in constant prices which refer to a base year other than 1980 have been shifted to the 1980 base. To obtain estimates of GDP in constant 1980 US dollars, weighted average exchange rates for converting total value of trade from national currencies into US dollars (as published by the United Nations) are being

used. However, adjustments to these exchange rates have been made for certain years for Angola, Cape Verde, Ghana, Equatorial Guinea, Guinea-Bissau, Sao Tome and Principe, Mozambique and Uganda to render them more realistic.

2. Countries with GDP estimates in current or constant prices: The procedure involves the calculation of sectoral deflators in respect of production sectors as well as expenditure categories. When official estimates are available in current prices only, GDP estimates in constant prices are obtained by applying these sectoral deflators to GDP estimates in current prices. The conversion of national currencies into US dollars follows the procedures described above.

3. Countries without any official GDP estimates for recent years: (this is the case for most countries of the African region): The procedures adopted are as follows:

- (a) Estimating sectoral growth rates in terms of volume (base year 1980);
- (b) Obtaining sectoral price deflators for production sectors and expenditure categories;
- (c) Multiplying sectoral growth rates by their respective sectoral price deflators (or inflators) and then by GDP figures for the base year to arrive at sectoral GDP estimates at current factor (or approximate factor) incomes;
- (d) Estimating indirect taxes net of subsidies by making use of either data from government accounts or past trends in indirect taxes expressed as a percentage of GDP at factor cost;
- (e) Obtaining estimates of GDP at current market prices (or purchasers' values) by using the formula:
$$\text{GDP at factor cost} + \text{indirect taxes (net)} = \text{GDP at market prices}.$$
- (f) Estimating the components of GDP by type of expenditure such as exports and imports of goods and services, capital formation, government consumption expenditure in current prices through the use of relevant indicators; estimates of private consumption expenditure are derived as a residual item by deducting from GDP at current purchasers' values, as obtained in (e) above, the other expenditure components of GDP.

Conversion of values from national currencies into US dollars is based on monthly conversion factors for visible imports and exports provided regularly by the United Nations Statistical Office in computer printouts and in the Yearbook of International Trade Statistics. This conversion is explained in greater detail in the last paragraph of this introduction. Weighted average currency rates (R) are then derived as follows

where "r" denotes "rate", and "v" refers to "value". The subscripts "i" and "e" refer to imports and exports respectively. The concepts and definitions used by most countries are in accordance with the United Nations system of National Accounts, Series F, No. 2, Rev. 3.

The international trade data, except terms-of-trade indices, are largely from magnetic tapes issued by the International Trade Section, United Nations Office at Geneva. They are supplemented by data from national and United Nations publications and by ECA estimates whenever possible. The estimation procedure has mainly been based on the interpolation of available developed market partner countries' data.

International trade statistics are reported under one of the following systems: The general trade system which includes goods kept in customs bond houses and exported without being cleared for domestic consumption and the special trade system which excludes them. The statistics of the following countries are based on the general trade system: Côte d'Ivoire, Ethiopia, Gambia, Ghana, Guinea, Kenya, Lesotho, Libyan Arab Jamahiriya, Malawi, Mauritius, Nigeria, Rwanda, Seychelles, Sierra Leone, Sudan, Swaziland,

United Republic of Tanzania, Tunisia, Uganda, and Zimbabwe. The following countries report their trade statistics under the special trade system: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Djibouti, Egypt, Equatorial Guinea, Gabon, Guinea Bissau, Liberia, Madagascar, Mali, Mauritania, Morocco, Mozambique, Niger, Sao Tome and Principe, Senegal, Somalia, Togo, Zaire and Zambia.

The statistics include merchandise, i.e. goods which add to or subtract from the stock of material resources in a country as a result of their movement into or out of the reporting country. All goods in transit are generally excluded from the statistics. Exports are generally valued free on board (f.o.b.) and imports at cost, insurance and freight (c.i.f.).

Conversion of values from national currencies into US dollars is done by means of currency conversion factors based on official exchange rates especially calculated for this purpose. The weighted average exchange rate for a given currency for a given year is the average of the component monthly factors mostly furnished by the International Monetary Fund, weighted by the value of the relevant trade in each month. A monthly factor is the exchange rate (or the simple average rate) in effect during that month. These factors are applicable to total imports and exports respectively, but not necessarily to trade in individual commodities or with individual countries (see United Nations Yearbook of International Trade Statistics).

Table 1. Area, output, consumer prices and population, 1985-1989

Subregion, Country	Area (sq. km)	GDP per capita (Dollars) 1989	GDP deflators (1980=100) 1985-89	Average annual growth rate (percentage)				
				Consumer price index (1985=100) 1985-89	Total population			
					1975-80	1980-85	1985-90	
NORTH AFRICA	8258703	1055	...	...	...	2.8	2.9	2.7
Algeria	2381741	2365	4.4	8.5	8.2	3.5	3.2	3.1
Egypt	1001449	550	11.9	20.3	21.3	2.7	2.7	2.3
Libyan Arab Jamahiriya	1759540	5560	2.6	...	...	6.0	2.9	3.7
Morocco	446550	715	6.0	4.2	3.2	2.3	2.6	2.3
Sudan	2505813	294	21.8	...	...	3.4	2.8	2.9
Tunisia	163610	1253	6.0	6.7	7.4	2.4	2.5	2.2
WEST AFRICA	6142686	334	...	...	...	3.1	3.2	3.3
Benin	112622	385	-1.4	...	...	2.4	3.1	3.1
Burkina Faso	274200	267	3.0	-0.4	0.5	2.4	2.5	2.7
Cape Verde	4033	382	3.4	...	...	1.4	2.0	2.4
Cote d'Ivoire	322463	520	1.1	3.9	1.0	4.0	4.3	3.5
Gambia	11295	216	9.3	25.3	0.0	3.6	3.5	2.1
Ghana	238537	355	35.0	30.2	25.2	2.6	2.6	2.9
Guinea	245857	367	21.7	...	...	1.0	2.5	2.5
Guinea-Bissau	36125	395	27.1	...	...	4.3	2.0	2.1
Liberia	111369	491	3.5	6.1	0.4	3.1	3.4	3.3
Mali	1240000	265	2.7	...	-0.2	2.2	2.8	2.9
Mauritania	1030700	502	10.6	5.4	4.8	1.5	2.7	3.1
Niger	1267000	311	-0.9	-3.5	-2.8	3.9	2.7	3.0
Nigeria	923768	306	29.9	23.7	40.9	3.5	3.3	3.5
Senegal	196192	470	4.0	0.2	0.5	3.6	2.9	2.7
Sierra Leone	71740	190	79.6	86.3	53.1	1.4	2.3	1.9
Togo	56785	420	2.8	0.8	-0.8	2.8	2.9	3.1
CENTRAL AFRICA	5420689	396	...	...	...	2.8	3.0	3.0
Burundi	27834	218	0.6	6.3	12.0	1.6	2.7	2.8
Cameroon	475442	1000	1.1	5.0	-2.4	2.9	3.2	2.8
Central African Republic	622984	426	0.3	-2.0	0.8	2.9	2.5	2.4
Chad	1284000	187	-3.1	-2.4	-6.6	2.2	2.4	2.4
Congo	342000	1210	7.8	3.1	4.0	4.3	3.5	2.7
Equatorial Guinea	28051	270	5.4	...	...	2.4	2.7	2.3
Gabon	267667	3080	-0.8	0.8	7.5	3.7	2.0	2.0
Rwanda	26338	250	0.8	1.9	1.0	3.3	3.6	3.4
Sao Tome and Principe	964	350	7.1	...	...	1.4	2.3	2.0
Zaire	2345409	150	47.0	81.0	104.1	3.6	2.7	3.0
EAST AND SOUTHERN AFRICA	8176279	268	...	...	...	3.3	3.0	3.1
Angola	1246700	674	2.3	...	...	2.9	3.0	2.7
Botswana	581730	1469	13.1	9.7	10.0	4.0	3.4	3.7
Comoros	2171	508	5.9	...	...	1.7	3.3	3.1
Djibouti	22000	738	1.8	...	...	2.2	3.8	2.9
Ethiopia	1221900	131	2.2	0.5	7.1	2.0	2.8	2.8
Kenya	582646	344	8.4	7.0	13.1	4.2	3.8	4.2
Lesotho	30355	244	12.7	14.0	11.2	2.5	2.3	2.6
Madagascar	587041	235	11.5	16.0	7.9	2.7	2.8	2.9
Malawi	118484	197	20.2	22.1	15.5	3.1	3.1	3.3
Mauritius	2045	1998	9.5	6.0	12.6	1.8	1.1	1.7
Mozambique	801590	90	13.3	...	...	4.5	2.6	2.7
Seychelles	280	4311	3.6	1.5	1.3	1.3	0.6	1.4
Somalia	637657	163	55.7	57.5	83.9	9.5	3.1	2.1
Swaziland	17363	749	12.6	12.7	14.3	2.8	3.2	3.1
Tanzania, United Rep. of	945087	110	31.4	30.5	28.1	2.5	3.3	3.7
Uganda	236036	290	173.2	170.1	90.2	3.4	3.5	3.5
Zambia	752614	396	71.2	68.7	124.7	3.1	3.3	3.4
Zimbabwe	390580	631	12.7	11.8	12.9	2.6	2.8	3.6
TOTAL AFRICA	27998357	489	...	...	...	3.2	3.0	3.1

Table 2. Economically active population and crude activity rates by sex, 1985 and 1989

Subregion, Country	Economically Active Population (thousands)						Crude Activity Rate (percentage)					
	Both Sexes		Male		Female		Both Sexes		Male		Female	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	34887	38795	29867	33535	5020	5978	28.05	27.96	47.68	47.90	8.15	8.70
Algeria	4828	5584	4402	5055	426	523	22.25	22.70	40.70	41.10	3.91	4.25
Egypt	13013	14580	11806	13133	1207	1446	27.35	27.64	48.90	49.02	5.15	5.57
Libyan Arab Jamahiriya	950	1091	873	993	77	97	25.10	24.88	43.76	43.23	4.30	4.65
Morocco	6736	7725	5407	6143	1329	1582	30.45	31.50	48.85	50.02	12.03	12.92
Sudan	7080	7413	5611	6227	1469	1717	32.45	30.28	51.25	50.64	13.51	14.09
Tunisia	2280	2402	1768	1984	512	613	31.40	30.06	48.10	49.00	14.28	15.55
WEST AFRICA	68149	75318	42808	47877	25341	27470	40.10	39.01	51.02	50.06	29.50	28.20
Benin	1964	2115	1016	1126	948	1022	48.50	46.06	51.06	49.91	46.02	43.75
Burkina Faso	4276	4642	2265	2488	2011	2154	51.14	52.97	58.05	57.38	50.53	48.66
Cape Verde	123	141	88	100	35	41	37.15	38.32	57.14	58.14	19.89	20.92
Cote d'Ivoire	4234	4812	2746	3150	1488	1662	41.30	39.78	52.80	51.32	29.46	27.89
Gambia	356	387	210	231	146	156	47.80	46.35	57.07	56.07	38.73	36.88
Ghana	4693	5186	2790	3118	1903	2068	36.55	35.60	43.80	43.10	29.42	28.21
Guinea	0	0	0	0	1161	1218	45.73	45.43	56.18	55.21	37.77	35.89
Guinea Bissau	427	452	248	266	179	184	48.03	46.79	57.54	56.72	39.08	37.02
Liberia	804	883	566	626	238	257	36.90	35.71	51.27	50.08	22.16	21.01
Mali	2599	2882	2161	2412	438	470	32.15	31.71	55.25	54.64	10.50	10.06
Mauritania	551	608	434	474	117	133	31.20	30.88	49.77	48.72	13.09	13.35
Niger	3204	3531	1686	1878	1518	1653	52.40	51.22	55.66	54.99	49.19	47.51
Nigeria	36556	40662	23493	26429	13063	14232	38.40	37.25	49.85	48.87	27.17	25.83
Senegal	2896	3127	1728	1892	1168	1235	44.95	43.61	54.17	53.33	35.89	34.09
Sierra Leone	1376	1478	913	993	463	485	37.55	36.53	50.78	50.03	24.80	23.53
Togo	1243	1366	778	866	465	500	42.00	40.79	53.25	52.33	31.02	29.52
CENTRAL AFRICA	26037	28649	16060	17883	9977	10765	41.80	40.54	52.24	51.31	31.60	30.05
Burundi	2519	2760	1303	1447	1216	1313	53.35	52.11	56.53	55.83	50.33	48.54
Cameroon	4070	4505	2669	2992	1401	1513	40.10	38.77	53.40	52.24	27.20	25.68
Central African Republic	1282	1365	680	738	602	627	49.75	48.05	54.49	53.44	45.33	42.95
Chad	1789	1937	1401	1525	388	412	35.65	34.98	56.70	55.88	15.23	14.67
Congo	710	767	431	468	279	299	40.80	39.54	50.23	48.90	31.63	30.42
Equatorial Guinea	136	144	80	86	56	58	43.17	41.74	51.95	50.89	34.78	32.96
Gabon	443	483	273	302	170	180	44.97	42.67	56.41	54.12	33.93	31.36
Rwanda	3078	3448	1586	1798	1492	1650	50.45	49.34	52.60	52.06	48.33	46.68
Sao Tome & Principe	48	52	29	32	19	20	45.15	42.98	54.72	53.33	34.55	32.79
Zaire	11962	13188	7608	8495	4354	4693	38.95	37.84	50.20	49.32	27.99	26.62
EAST AND SOUTHERN AFRICA	74503	81558	43460	48330	31043	33515	44.45	43.06	52.45	51.62	36.60	34.99
Angola	3720	4011	2243	2454	1477	1557	42.50	41.15	52.09	51.16	33.21	31.46
Botswana	371	420	234	271	137	149	34.40	33.84	45.70	45.78	24.21	22.96
Comoros	179	203	105	121	74	82	46.02	45.01	54.40	54.02	37.76	36.12
Djibouti	187	246	112	146	75	100	43.49	45.72	51.61	53.88	35.21	37.45
Ethiopia	18620	19573	11493	12201	7127	7371	44.05	42.84	54.55	53.92	33.62	31.96
Kenya	8284	9554	4922	5751	3362	3803	40.70	39.65	48.35	47.69	33.05	31.59
Lesotho	739	809	408	455	331	355	48.05	46.93	55.21	54.89	41.43	39.67
Madagascar	4605	5064	2735	3052	1870	2012	45.05	43.65	54.16	53.17	36.16	34.32
Malawi	3160	3503	1814	2049	1346	1455	44.25	42.98	51.90	51.14	36.92	35.11
Mauritius	366	388	275	289	91	103	37.15	37.93	56.58	57.23	18.24	19.88
Mozambique	7539	8125	3853	4225	3686	3900	54.95	53.29	57.01	56.21	52.95	50.45
Seychelles	23	25	17	19	6	7	35.20	36.77	53.13	57.58	18.18	20.00
Somalia	2748	3051	1595	1800	1153	1250	42.95	41.57	52.45	51.22	34.35	32.68
Swaziland	280	310	168	188	112	122	42.11	40.63	51.22	50.00	33.23	31.53
Tanzania, Un. Rep. of	11034	12103	5639	6433	5395	5953	48.50	45.94	50.25	49.42	46.80	44.68
Uganda	7064	7907	4099	4649	2965	3257	45.60	44.41	53.41	52.67	37.94	36.28
Zambia	2358	2724	1676	1923	682	801	33.65	33.43	48.66	47.86	19.14	19.40
Zimbabwe	3226	3542	2072	2304	1154	1238	38.85	37.61	50.35	55.28	27.55	26.06
TOTAL AFRICA 1/	204	224	132	148	71	78	38.85	37.90	62.90	50.19	27.05	26.11

1/ Economically active population is given in millions

Table 3. Selected Demographic Indicators, 1985 and 1989

Subregion, Country	Crude birth			Crude death			Infant mortality		
	Rate per thousand population		Index number 1985=100	Rate per thousand population		Index number 1985=100	Rate	Index number 1985=100	
	1985	1989		1985	1989			1985	1989
	1985	1989	1989	1985	1989	1989	1985	1989	1989
NORTH AFRICA	39.1	...	...	11.3	...	...	91	...	...
Algeria	41.1	38.6	94	9.7	8.5	88	80	69	86
Egypt	37.5	34.0	91	10.8	9.0	83	91	79	87
Libyan Arab Jamahiriya	44.6	43.7	98	10.0	8.6	86	88	76	86
Morocco	36.5	33.9	93	10.4	8.7	84	88	76	86
Sudan	45.1	44.1	98	16.4	14.6	89	112	104	93
Tunisia	31.7	28.7	91	7.8	7.4	95	64	54	84
WEST AFRICA	49.2	...	...	17.1	...	...	116	...	...
Benin	50.6	50.1	99	19.9	18.3	92	114	106	93
Burkina Faso	47.2	46.9	99	19.1	17.1	90	143	134	94
Cape Verde	36.4	39.1	107	10.8	9.7	90	70	62	89
Cote d'Ivoire	50.9	50.6	99	14.8	13.5	91	100	92	92
Gambia	47.4	46.2	97	22.1	20.6	93	147	139	95
Ghana	44.7	43.7	98	13.5	12.6	93	93	86	92
Guinea	46.7	46.2	99	22.5	21.3	95	152	143	94
Guinea Bissau	40.8	41.0	100	23.7	22.3	94	136	128	94
Liberia	45.0	44.8	100	16.2	15.1	94	91	84	92
Mali	50.3	49.7	99	21.5	20.1	93	173	165	95
Mauritania	46.3	45.5	98	19.6	8.4	94	131	123	94
Niger	50.9	50.6	99	21.7	19.7	91	139	131	94
Nigeria	50.0	49.4	99	16.2	15.0	92	109	101	93
Senegal	46.0	45.2	98	18.4	17.1	93	134	124	93
Sierra Leone	48.3	47.9	99	24.1	22.7	94	159	150	94
Togo	45.0	44.5	99	14.7	13.6	92	97	90	93
CENTRAL AFRICA	45.4	...	...	16.3	...	...	108	...	...
Burundi	46.3	44.7	97	17.8	17.3	97	118	108	92
Cameroon	42.7	41.5	97	15.3	14.3	93	98	91	93
Central African Republic	44.4	43.9	99	18.4	17.2	93	136	128	94
Chad	44.2	43.8	99	20.3	18.9	93	136	128	94
Congo	44.4	44.0	99	14.8	14.0	95	76	70	92
Equatorial Guinea	42.4	42.1	99	19.8	19.0	96	131	123	94
Gabon	36.8	40.5	110	17.3	16.5	95	107	99	93
Rwanda	51.5	50.5	98	17.8	16.6	93	126	118	94
Sao Tome & Principe	44.0	42.7	97	8.5	7.2	85	49	47	96
Zaire	45.4	45.2	100	14.9	13.8	93	102	95	93
EAST AND SOUTHERN AFRICA	49.5	...	...	17.8	...	...	118	...	...
Angola	47.2	47.0	100	21.0	19.6	93	142	133	94
Botswana	48.1	46.3	101	12.7	10.8	85	71	63	89
Comoros	45.9	45.2	98	13.6	12.5	92	83	77	93
Djibouti	47.5	47.0	99	18.4	17.2	93	126	118	94
Ethiopia	43.4	44.8	103	21.8	19.7	90	156	150	96
Kenya	53.9	52.7	98	12.6	10.7	85	75	69	92
Lesotho	41.1	40.2	98	13.0	11.8	91	104	96	92
Madagascar	44.2	45.3	102	14.6	13.4	92	124	116	94
Malawi	53.0	52.4	99	20.6	20.0	94	155	145	94
Mauritius	20.1	18.3	91	5.6	6.4	102	25	22	88
Mozambique	45.3	44.5	98	19.0	17.9	94	146	137	94
Seychelles	27.7	...	...	7.2	6.8	94	31	30	97
Somalia	52.0	49.1	94	21.0	19.4	92	136	128	94
Swaziland	46.9	46.2	99	13.1	11.9	91	122	114	93
Tanzania, Un. Rep. of	50.5	50.1	99	14.5	13.5	92	110	102	93
Uganda	50.2	49.7	99	16.2	15.0	93	107	99	93
Zambia	51.0	50.4	99	14.2	13.2	93	83	77	93
Zimbabwe	42.0	41.0	98	10.8	...	90	75	69	92
TOTAL AFRICA	45.0	...	...	15.5	...	...	110	...	...

Table 3. Selected demographic indicators, 1985 and 1989 (continued)

Subregion, Country	U r b a n							
	Total population (Ten thousand)			As percentage of total population			Average annual growth rate (percentage)	
	1985	1988	1989	1985	1988	1989	1980-85	1985-90
NORTH AFRICA	12319	13335	13683	41.9	43.3	43.8	3.8	3.8
Algeria	2179	2365	2429	42.6	43.9	44.3	3.7	4.1
Egypt	4651	5005	5123	46.5	47.8	48.3	3.5	3.5
Libyan Arab Jamahiriya	379	423	439	64.5	68.0	69.1	7.0	5.4
Morocco	2203	2381	2443	44.8	47.0	47.8	4.3	4.1
Sudan	2182	2380	2449	20.6	21.4	21.7	4.0	4.2
Tunisia	726	781	800	53.0	53.8	54.0	2.9	2.9
WEST AFRICA	16514	18168	18759	29.4	31.6	32.4	5.8	5.7
Benin	399	436	449	35.2	39.3	...	7.4	6.7
Burkina Faso	788	852	875	7.9	8.6	8.8	4.8	5.4
Cape Verde	32	35	36	53.3	58.2	59.9	6.7	5.7
Cote d'Ivoire	993	1112	1155	42.0	44.8	45.7	6.6	6.2
Gambia	75	81	84	20.1	21.5	22.0	5.1	5.1
Ghana	1284	1413	1457	31.5	32.4	32.7	4.1	4.1
Guinea	499	542	559	22.2	24.3	25.0	5.4	5.4
Guinea Bissau	87	93	94	27.1	29.3	30.0	4.6	4.6
Liberia	220	242	249	44.0	42.2	43.1	5.7	5.3
Mali	792	866	893	18.0	18.1	18.2	3.6	4.2
Mauritania	177	192	197	34.6	39.1	40.6	7.7	6.6
Niger	661	726	749	16.2	18.2	18.8	6.9	6.7
Nigeria	9202	10159	10502	31.0	33.5	34.4	6.1	5.9
Senegal	638	693	713	36.4	37.6	38.0	3.3	3.8
Sierra Leone	367	395	405	28.3	30.6	31.4	5.1	5.1
Togo	303	332	342	22.1	24.3	25.0	6.2	6.1
CENTRAL AFRICA	6229	6831	7048	31.4	34.9	...	5.2	6.6
Burundi	473	516	531	5.6	6.6	7.0	8.8	8.3
Cameroon	1005	1107	1144	42.4	46.6	48.0	6.7	5.7
Central African Republic	265	287	295	42.4	44.9	45.8	4.4	4.3
Chad	502	540	554	27.0	30.8	32.0	7.5	6.7
Congo	194	213	220	39.5	41.1	41.7	3.7	4.1
Equatorial Guinea	31	34	35	59.7	62.6	63.5	4.3	3.9
Gabon	99	110	113	40.9	43.8	44.7	6.7	5.7
Rwanda	610	676	699	6.2	7.1	7.4	7.7	7.6
Sao Tome & Principe	11	12	12	37.6	40.5	...	5.5	5.1
Zaire	3040	3337	3445	36.6	38.3	38.9	4.4	4.7
EAST AND SOUTHERN AFRICA	17007	18692	19303	19.5	21.1	...	6.9	5.9
Angola	875	948	975	24.5	26.8	27.5	5.6	5.6
Botswana	108	121	126	19.2	21.8	22.7	8.2	7.6
Comoros	46	51	53	25.2	26.6	27.1	4.7	5.0
Djibouti	43	51	54	77.7	80.8	...	4.2	3.7
Ethiopia	4308	4654	4786	11.6	11.4	11.6	3.7	4.3
Kenya	2010	2237	2318	19.7	22.0	22.8	8.1	7.8
Lesotho	154	168	172	16.7	18.9	19.6	7.0	6.7
Madagascar	1024	1126	1162	21.8	23.7	24.4	5.9	6.0
Malawi	734	815	845	12.0	13.7	14.2	7.6	7.4
Mauritius	102	106	107	42.2	42.3	42.3	1.3	1.3
Mozambique	1371	1484	1524	19.4	22.6	23.7	10.4	9.0
Seychelles	7	7	7	51.8	54.5	...	6.2	5.9
Somalia	637	706	729	32.5	34.9	35.7	5.9	5.6
Swaziland	66	74	76	26.3	30.4	31.7	9.0	8.0
Tanzania, Un. Rep. of	2275	2538	2633	24.4	29.4	31.1	11.6	9.6
Uganda	1565	1745	1811	9.4	10.2	10.4	4.8	5.5
Zambia	701	784	814	49.5	53.0	54.2	6.9	6.1
Zimbabwe	829	911	941	24.6	26.4	27.0	5.3	5.5
TOTAL AFRICA	52068	57026	58792	31.1	33.1	33.8	5.2	5.2

Table 3. Selected demographic indicators 1985 and 1989 (continued)

Subregion, Country	Life expectancy at birth	Total fertility			Gross reproduction		
		Rate		Index number	Rate		Index number
				1985=100			1985=100
		1989	1985	1989	1989	1985	1989
NORTH AFRICA	60	5.5	5.1	...	2.7	...	...
Algeria	63	6.3	5.8	92	3.1	2.8	90
Egypt	62	5.0	4.6	92	2.4	2.2	92
Libyan Arab Jamahiriya	61	7.0	6.8	87	3.4	3.3	97
Morocco	62	5.1	6.6	90	2.5	2.2	88
Sudan	51	6.5	6.4	98	3.2	3.1	97
Tunisia	66	4.4	3.8	86	2.2	1.9	86
WEST AFRICA	50	6.9	...	...	3.4	...	...
Benin	47	7.0	7.0	100	3.5	3.4	97
Burkina Faso	48	6.5	6.5	100	3.2	3.2	100
Cape Verde	62	5.2	5.1	98	2.6	2.5	96
Cote d'Ivoire	53	7.4	7.4	100	3.7	3.6	97
Gambia	44	6.4	6.3	98	3.2	3.1	97
Ghana	55	6.4	6.3	98	3.2	3.1	97
Guinea	43	6.2	6.2	100	3.1	3.0	97
Guinea Bissau	46	5.4	5.4	100	2.7	2.7	100
Liberia	55	6.5	6.5	100	3.2	3.2	100
Mali	45	6.7	6.7	100	3.3	3.3	100
Mauritania	47	6.5	6.5	100	3.2	3.2	100
Niger	45	7.1	7.1	100	3.5	3.5	100
Nigeria	52	7.0	6.9	99	3.5	3.4	97
Senegal	47	6.4	6.3	98	3.2	3.1	97
Sierra Leone	42	6.5	6.5	100	3.2	3.2	100
Togo	54	6.1	6.1	100	3.0	3.0	100
CENTRAL AFRICA	51	6.0	...	...	3.0	...	...
Burundi	50	6.4	6.2	97	3.1	3.1	100
Cameroon	52	5.8	5.8	100	2.9	2.8	97
Central African Republic	46	5.9	5.9	100	2.9	2.9	100
Chad	46	5.9	5.9	100	2.9	2.9	100
Congo	49	6.0	6.0	100	3.0	2.9	97
Equatorial Guinea	47	5.7	5.6	97	2.8	2.8	100
Gabon	52	4.9	5.1	104	2.4	2.5	104
Rwanda	49	8.3	8.2	98	4.1	4.0	98
Sao Tome and Principe	67	6.8	6.5	96	3.3	3.2	97
Zaire	53	6.1	6.1	100	3.0	3.0	100
EAST AND SOUTHERN AFRICA	50	6.8	...	...	3.1	...	...
Angola	46	6.4	6.4	100	3.2	3.1	97
Botswana	60	6.4	6.3	98	3.1	3.0	97
Comoros	53	6.2	6.1	98	3.1	3.0	97
Djibouti	48	6.6	6.6	100	3.3	3.2	97
Ethiopia	42	6.7	6.2	102	3.0	3.1	100
Kenya	58	8.1	7.9	98	4.0	3.9	98
Lesotho	57	5.8	5.7	98	2.9	2.8	97
Madagascar	54	6.6	6.6	100	3.3	3.3	100
Malawi	48	7.0	7.0	100	3.5	3.4	97
Mauritius	69	2.1	1.9	90	1.0	1.0	100
Mozambique	47	6.4	6.3	98	3.2	3.1	97
Seychelles	71	3.5	...	...	1.7	1.6	94
Somalia	46	6.6	6.6	100	3.3	3.2	97
Swaziland	57	6.5	6.4	98	3.2	3.2	100
Tanzania, United Rep. of	54	7.1	7.1	100	3.5	3.5	100
Uganda	52	6.9	6.9	100	3.4	3.5	103
Zambia	54	7.2	7.1	99	3.6	3.5	97
Zimbabwe	59	6.0	5.6	93	3.0	2.8	93
TOTAL AFRICA	53	6.3	...	...	3.1	...	...

Table 4. Students enrolled at first level of education

Subregion, Country	(Thousands)									
	Male					Female				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	9074	9356	9787	10116	10468	6720	7031	7285	7634	8004
Algeria	1965	2036	2119	2170	2232	1516	1599	1683	1741	1804
Egypt	3530	3726	4026	4171	4320	2685	2887	3009	3180	3360
Libyan Arab Jamahiriya	418	433	448	464	583	371	384	397	411	428
Morocco	1409	1373	1336	1375	1415	871	855	841	886	934
Sudan	1035	1052	1114	1178	1147	703	715	754	796	840
Tunisia	717	735	744	757	771	575	591	602	620	638
WEST AFRICA	10356	11646	12256	12947	13741	8222	8672	9236	9853	10535
Benin	295	294	307	312	335	149	151	155	159	175
Burkina Faso	222	246	259	276	294	130	144	153	169	187
Cape Verde	29	31	31	31	31	29	30	30	30	30
Cote d'Ivoire	721	747	793	842	894	501	507	553	602	655
Gambia	45	46	46	45	46	28	29	30	29	30
Ghana	906	889	880	926	975	690	676	702	740	780
Guinea	189	187	200	202	204	88	83	89	92	95
Guinea Bissau	51	50	52	55	57	26	27	29	30	32
Liberia	83	81	85	88	92	45	44	47	51	55
Mali	184	188	193	201	210	109	111	114	122	129
Mauritania	85	93	93	98	103	56	58	64	70	76
Niger	164	188	198	203	222	99	105	110	115	128
Nigeria	6510	7689	8178	8698	9251	5685	6078	6498	6946	7426
Senegal	349	363	379	396	414	235	248	263	277	291
Sierra Leone	234	234	234	233	260	170	180	190	200	211
Togo	290	321	329	341	353	182	200	209	221	234
CENTRAL AFRICA	5201	4795	5119	5314	5536	3753	3853	4097	4307	4541
Burundi	224	259	307	329	354	161	193	229	249	271
Cameroon	927	973	1009	1045	1083	778	822	854	888	923
Central African Republic	189	169	177	184	191	121	105	109	117	126
Chad	242	225	300	311	329	95	85	120	130	141
Congo	229	233	263	259	267	231	243	236	232	241
Equatorial Guinea	36	37	38	39	40	32	34	35	37	39
Gabon	93	96	99	101	104	90	95	97	100	103
Rwanda	428	459	491	512	534	409	445	479	502	526
Sao Tome & Principe	9	9	9	10	10	8	8	9	9	9
Zaire	2824	2333	2427	2524	2624	1827	1823	1929	2043	2162
EAST AND SOUTHERN AFRICA	11653	12049	12404	12883	13540	10057	10476	10767	11285	11968
Angola	488	508	528	550	578	416	432	450	469	497
Botswana	106	114	115	124	133	117	122	124	133	144
Comoros	37	35	36	37	40	28	27	28	29	33
Djibouti	15	16	17	17	19	10	11	12	12	14
Ethiopia	1491	1682	1787	1855	1925	958	1054	1097	1165	1237
Kenya	2435	2513	2604	2747	2897	2268	2330	2427	2580	2743
Lesotho	139	142	150	159	168	175	177	186	195	205
Madagascar	828	807	786	766	815	772	755	738	722	758
Malawi	534	573	593	632	634	409	449	473	503	534
Mauritius	71	73	73	71	70	70	71	71	69	68
Mozambique	702	707	723	754	786	546	554	565	591	619
Seychelles	7	7	7	7	7	7	7	7	7	7
Somalia	128	144	162	183	205	66	78	91	106	125
Swaziland	70	71	74	77	81	69	71	74	76	80
Tanzania, Un. Rep. of	1590	1578	1585	1669	1757	1580	1581	1575	1681	1794
Uganda	1157	1208	1261	1317	1374	858	996	1067	1143	1225
Zambia	713	716	755	796	839	636	642	677	714	753
Zimbabwe	1141	1154	1146	1123	1180	1074	1119	1105	1089	1154
TOTAL AFRICA	36284	37845	39565	41259	43285	28753	30032	31386	33079	35048

Table 5. Gross domestic product at current factor cost, 1985-1989

Subregion, country	Total (millions of dollars)					Per Capita (dollars)				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	106052	111068	121319	122467	118999	853	869	923	907	858
Algeria	44485	48189	50005	48004	45693	2050	2153	2165	2014	1858
Egypt	17748	19035	25123	26465	23715	373	390	501	514	450
Libyan Arab Jamahiriya	22760	19574	20158	21203	22398	6012	4974	4937	5010	5108
Morocco	10139	11597	11890	11340	12663	458	511	510	474	516
Sudan	4154	5768	6514	6927	6360	190	257	282	291	260
Tunisia	6766	6906	7629	8528	8170	932	928	1000	1092	1022
WEST AFRICA	85749	85690	66966	60748	60695	506	490	370	325	314
Benin	1053	1374	1522	1605	1719	260	329	353	361	374
Burkina Faso	1250	1535	1508	1831	2083	159	190	182	215	238
Cape Verde	108	117	116	120	148	327	345	334	334	401
Cote d'Ivoire	6968	6957	6681	6737	6544	680	651	600	580	541
Gambia	130	128	134	176	174	175	167	169	217	208
Ghana	4049	4358	4566	4849	4525	315	328	333	343	311
Guinea	4198	3019	2483	2633	1933	724	485	389	403	288
Guinea-Bissau	482	453	317	189	218	542	500	342	200	225
Liberia	959	935	991	1053	1084	440	416	427	439	438
Mali	1005	1090	1552	1841	2106	124	131	181	209	232
Mauritania	599	668	731	779	764	339	368	392	406	388
Niger	1335	1727	1725	2171	2059	218	274	266	325	299
Nigeria	59768	59583	40880	32321	32614	628	605	401	306	299
Senegal	2037	2053	2112	2686	2777	316	310	311	385	387
Sierra Leone	935	1008	947	869	736	255	268	246	220	182
Togo	673	684	702	889	1212	227	224	223	274	362
CENTRAL AFRICA	21308	21157	22800	26007	25117	341	329	343	380	355
Burundi	1065	1110	1067	1002	1092	226	228	213	195	206
Cameroon	7492	7407	10200	10742	10041	738	706	939	956	864
Central African Republic	641	642	875	1045	1161	249	243	324	377	409
Chad	690	574	506	592	1011	138	112	96	110	183
Congo	1830	1797	2141	2222	2309	1052	1006	1165	1177	1190
Equatorial Guinea	53	54	60	62	66	167	168	183	185	191
Gabon	3147	2991	2564	2868	2740	3195	2930	2424	2622	2420
Rwanda	1392	1410	1478	1640	1699	228	223	226	243	243
Sao Tome and Principe	31	30	30	31	32	283	269	266	264	266
Zaire	4967	5141	3878	5802	4967	162	162	119	172	143
EAST AND SOUTHERN AFRICA	37862	40505	41944	42726	41627	226	235	236	233	220
Angola	4391	4453	4595	4902	5116	502	496	498	517	525
Botswana	827	908	1097	1152	1735	767	813	948	962	1398
Comoros	107	152	157	187	204	275	376	375	431	452
Djibouti	293	308	311	321	330	682	675	645	627	613
Ethiopia	4303	4695	4830	4950	5362	102	109	110	111	117
Kenya	6009	6955	7287	7196	7127	295	328	329	312	296
Lesotho	205	217	284	346	358	133	137	174	207	208
Madagascar	2041	2283	2336	2153	2191	200	216	215	192	189
Malawi	1017	1158	1122	1294	1461	142	157	147	164	179
Mauritius	906	1222	1325	1545	1708	920	1229	1320	1523	1669
Mozambique	1817	2005	1810	1297	1072	132	142	125	87	70
Seychelles	140	138	174	211	226	2161	2092	2635	3149	3320
Somalia	1067	1028	1155	1134	1089	167	155	168	160	148
Swaziland	295	379	438	503	562	444	551	614	683	736
Tanzania, United Rep. of	4640	4666	4521	4052	2476	204	198	185	160	94
Uganda	3459	3483	3966	4236	3227	223	217	239	246	181
Zambia	2449	1856	1774	2009	2118	350	255	235	256	260
Zimbabwe	3895	4598	4763	5235	5266	469	537	539	574	559
TOTAL AFRICA	250971	258419	253029	251948	246439	479	479	455	439	416

Table 6. Gross domestic product by kind of economic activity at current factor cost, 1985-1989

(Millions of dollars)

Subregion, country	Agriculture					Mining and quarrying				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	11367	13403	16121	16114	15382	25754	18682	20037	19570	17366
Algeria	3399	3836	3891	3435	3240	12403	9753	10790	9823	8532
Egypt	2841	2706	5309	5471	4902	2483	2462	2691	2876	2577
Libyan Arab Jamahiriya	720	1028	1151	1210	1318	9517	5105	5143	5411	5703
Morocco	2075	2698	2218	2110	2278	557	557	576	522	548
Sudan	1210	1932	2123	2258	2072	4	5	6	6	6
Tunisia	1122	1203	1430	1631	1571	789	801	830	932	...
WEST AFRICA	30708	31380	21863	22439	22294	11193	8441	12568	8143	8002
Benin	400	579	588	640	688	57	29	28	28	32
Burkina Faso	550	645	634	770	866	9	13	18	22	24
Cape Verde	23	24	24	25	31	1	1	...	...	...
Cote d'Ivoire	1865	1885	1743	1792	1763	178	153	152	150	143
Gambia	31	35	36	48	50	...	...	...	...	...
Ghana	1713	1769	1992	2078	1844	44	66	75	88	80
Guinea	2223	1481	1204	1259	916	555	403	335	340	259
Guinea Bissau	239	216	166	86	99	...	...	...	...	...
Liberia	351	343	382	412	425	128	119	105	115	115
Mali	493	603	848	993	1138	17	16	24	29	32
Mauritania	163	197	216	233	235	78	72	76	80	76
Niger	632	861	835	1124	1022	124	140	140	155	131
Nigeria	20947	21632	12092	11731	11935	9848	7166	11438	6962	6911
Senegal	413	444	449	577	571	31	30	29	36	37
Sierra Leone	416	401	388	346	285	58	181	108	86	70
Togo	249	265	265	323	425	64	46	40	51	91
CENTRAL AFRICA	5238	5446	5935	6436	6745	4927	4052	3477	4599	3984
Burundi	642	631	571	528	575	2	4	6	5	5
Cameroon	1702	1796	2486	2446	2414	1368	978	1262	1962	1398
Central African Republic	263	272	352	444	496	18	17	25	29	32
Chad	307	222	196	253	418	1	1	1	1	3
Congo	160	220	257	267	274	689	399	449	475	491
Equatorial Guinea	24	25	27	28	30	...	...	...	...	...
Gabon	200	241	210	257	247	1319	970	797	900	852
Rwanda	570	581	612	690	728	4	4	4	4	4
Sao Tome and Principe	8	8	8	8	8	...	...	...	...	...
Zaire	1362	1451	1215	1515	1556	1523	1678	935	1224	1197
EAST AND SOUTHERN AFRICA	15099	16189	16407	16488	14707	1781	1667	1697	1783	2212
Angola	2033	2193	2173	2274	2332	764	543	549	591	676
Botswana	45	41	41	37	56	339	409	497	555	818
Comoros	43	64	66	81	89	...	...	...	...	...
Djibouti	8	8	9	9	10	...	...	...	...	...
Ethiopia	1891	2104	2086	2090	2312	7	7	6	7	7
Kenya	1954	2298	2314	2296	2208	14	16	17	15	18
Lesotho	43	41	56	83	86	1	1	1	...	...
Madagascar	896	966	981	884	879	5	5	6	6	6
Malawi	385	437	421	454	516	...	...	...	...	...
Mauritius	139	186	194	207	210	1	2	2	2	2
Mozambique	890	896	812	582	481	4	4	4	3	2
Seychelles	10	11	12	13	14	...	...	...	...	...
Somalia	712	641	741	777	713	4	4	4	4	4
Swaziland	73	91	98	104	112	8	10	10	11	13
Tanzania, United Rep. of	2629	2789	2833	2658	1556	11	16	15	11	6
Uganda	2353	2473	2780	2845	2160	2	2	1	...	...
Zambia	346	248	217	366	308	412	370	267	229	284
Zimbabwe	649	701	573	727	666	210	279	318	349	375
TOTAL AFRICA	62413	66418	60326	61478	59128	43654	32843	37779	34094	31563

Table 6. Gross domestic product by kind of economic activity at current factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Manufacturing					Electricity, gas and water				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	11247	13104	14164	13883	13940	1617	2023	2249	2358	2411
Algeria	4787	5893	6075	5377	5377	778	946	975	997	994
Egypt	2270	2330	2640	2841	2546	163	217	318	342	307
Libyan Arab Jamahiriya	1038	1333	1515	1594	1822	290	370	410	432	492
Morocco	1823	2014	2146	2029	2257	143	187	206	212	259
Sudan	392	514	581	619	568	128	174	187	198	182
Tunisia	937	1021	1208	1423	1371	117	128	152	177	178
WEST AFRICA	9025	9530	6463	5872	5926	639	648	508	511	516
Benin	47	53	58	65	72	8	12	15	16	17
Burkina Faso	190	248	244	297	342	7	7	7	9	10
Cape Verde	6	6	6	7	8	3	3	3	3	4
Cote d'Ivoire	893	988	939	969	929	75	78	127	142	134
Gambia	13	11	12	16	15	1	1	1	1	1
Ghana	586	550	518	567	512	26	38	41	40	36
Guinea	193	128	98	105	80	10	8	9	11	8
Guinea-Bissau	8	24	8	6	11	12	36	11	6	3
Liberia	65	60	73	80	84	17	19	19	19	19
Mali	88	86	118	135	149	15	14	23	27	31
Mauritania	30	36	40	43	43	5	6	7	8	8
Niger	53	68	70	80	77	13	16	17	20	19
Nigeria	6396	6815	3778	2886	2945	395	351	163	122	121
Senegal	382	376	404	511	536	38	37	39	50	53
Sierra Leone	33	36	46	42	35	2	3	6	3	3
Togo	42	47	50	63	86	14	18	21	34	49
CENTRAL AFRICA	1565	1748	2222	2079	2352	187	213	244	250	256
Burundi	84	95	117	115	128	3	4	6	5	6
Cameroon	779	883	1363	1117	1324	83	91	122	120	118
Central African Republic	52	51	67	77	85	3	3	4	5	5
Chad	110	103	87	98	157	3	4	4	4	7
Congo	97	144	170	179	187	26	25	31	32	38
Equatorial Guinea	2	2	3	3	3	-	-	-	1	1
Gabon	200	222	194	205	199	61	78	70	75	74
Rwanda	156	159	165	189	198	4	4	4	4	4
Sao Tome and Principe	3	3	3	3	3	1	1	1	1	1
Zaire	80	87	52	93	67	3	3	2	4	3
EAST AND SOUTHERN AFRICA	4384	4940	5235	5381	5504	530	646	709	647	699
Angola	127	126	138	149	161	21	23	26	27	29
Botswana	49	56	69	63	96	24	25	33	32	48
Comoros	4	6	6	7	8	1	2	2	2	2
Djibouti	13	14	15	15	17	17	17	18	19	20
Ethiopia	494	518	564	580	594	36	53	65	70	78
Kenya	705	827	847	848	832	106	114	118	111	108
Lesotho	23	28	41	49	52	2	2	2	4	4
Madagascar	232	278	276	256	265	23	25	26	23	23
Malawi	146	165	159	151	171	19	22	21	27	31
Mauritius	187	284	326	370	423	26	34	33	34	36
Mozambique	383	486	446	320	264	74	89	79	57	47
Seychelles	16	16	20	27	29	4	4	2	4	5
Somalia	53	57	60	62	59	1	2	6	40	8
Swaziland	48	75	80	105	119	10	12	14	16	18
Tanzania, United Rep. of	286	283	220	165	97	46	49	68	60	35
Uganda	83	114	153	195	132	5	3	3	5	5
Zambia	604	462	552	688	791	27	26	24	22	18
Zimbabwe	931	1146	1263	1330	1394	90	143	182	174	185
TOTAL AFRICA	26220	29322	28084	27214	27722	2974	3530	3710	3766	3883

Table 6. Gross domestic product by kind of economic activity at current factor cost, 1985-1989
(Continued)

Subregion, country	(Millions of dollars)									
	Construction					Commerce				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	12344	14023	14478	14812	14354	20791	23939	26717	27353	26705
Algeria	7457	8951	9227	9355	8900	7122	8558	8584	8321	8129
Egypt	899	998	1222	1301	1167	5573	6381	8065	8481	7599
Libyan Arab Jamahiriya	2619	2636	2548	2680	2719	3511	3835	4117	4329	4510
Morocco	705	787	823	786	875	2021	2244	2689	2657	3121
Sudan	220	263	289	307	282	1082	1432	1662	1768	1624
Tunisia	444	388	369	383	411	1481	1498	1601	1795	1723
WEST AFRICA	2026	2443	2029	1644	1712	19070	19922	13345	11945	12018
Benin	52	71	87	92	100	209	271	312	318	335
Burkina Faso	88	154	157	192	227	232	242	235	281	316
Cape Verde	21	24	23	24	29	30	33	33	34	42
Cote d'Ivoire	183	183	194	193	190	1443	1415	1016	867	846
Gambia	10	8	9	12	12	35	33	35	47	45
Ghana	131	113	117	127	114	764	792	766	855	768
Guinea	113	88	77	85	78	662	482	416	455	330
Guinea Bissau	9	26	15	12	14	109	82	80	53	60
Liberia	32	29	33	29	30	169	170	179	200	207
Mali	50	49	74	93	110	170	160	225	262	290
Mauritania	42	44	49	48	45	111	124	138	151	146
Niger	48	66	73	80	83	234	290	304	367	381
Nigeria	1047	1390	917	406	407	14134	15056	8821	7116	7211
Senegal	149	147	155	201	215	386	389	382	484	533
Sierra Leone	26	24	21	15	13	239	236	252	262	234
Togo	24	28	27	35	44	143	146	151	192	274
CENTRAL AFRICA	1333	1348	1368	1619	1442	4411	4419	4967	5763	5394
Burundi	46	43	46	42	46	110	129	122	106	115
Cameroon	473	515	564	678	547	1936	1914	2591	2776	2516
Central African Republic	13	15	23	28	31	171	164	233	273	307
Chad	7	7	7	7	12	207	183	156	174	298
Congo	130	111	133	135	144	228	261	304	311	326
Equatorial Guinea	3	3	3	3	4	6	6	7	7	7
Gabon	298	304	263	266	258	482	528	461	502	478
Rwanda	112	106	112	120	121	268	274	286	308	314
Sao Tome and Principe	3	3	3	3	3	3	3	3	3	4
Zaire	248	241	214	338	274	1000	956	804	1303	1029
EAST AND SOUTHERN AFRICA	1345	1403	1498	1571	1602	6767	7418	7713	8028	7742
Angola	92	87	93	98	104	287	315	344	381	395
Botswana	36	27	32	42	74	148	176	202	207	282
Comoros	11	13	13	15	16	21	30	32	36	39
Djibouti	17	18	18	19	20	106	108	111	113	116
Ethiopia	185	192	204	202	221	723	807	842	887	948
Kenya	323	336	374	415	464	1597	1782	1934	1950	1934
Lesotho	36	30	42	50	50	56	61	75	84	91
Madagascar	76	87	88	82	84	264	299	299	279	284
Malawi	46	52	50	48	54	212	245	239	281	313
Mauritius	51	65	70	92	108	263	344	366	440	505
Mozambique	134	145	126	90	75	99	107	96	69	57
Seychelles	10	10	11	13	14	34	40	54	68	73
Somalia	24	41	59	44	41	157	166	189	177	163
Swaziland	11	15	17	19	21	88	103	114	130	147
Tanzania, United Rep. of	88	104	81	68	39	895	915	820	770	448
Uganda	39	29	74	119	95	534	589	649	775	569
Zambia	68	46	39	45	32	540	446	464	436	453
Zimbabwe	96	105	105	111	90	743	883	883	945	926
TOTAL AFRICA	17048	19218	19373	19647	19111	51039	55698	52742	53089	51859

Table 6. Gross domestic product by kind of economic activity at current factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Transport and communications					Public administration and defence				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	6468	7482	8461	8866	8237	12109	13839	14053	14367	14210
Algeria	2230	2660	2914	3075	3087	5730	6901	6802	6839	6655
Egypt	1576	1815	2308	2444	2190	1140	1219	1437	1529	1370
Libyan Arab Jamahiriya	1134	1296	1356	1426	1487	2426	2600	2451	2578	2740
Morocco	610	687	722	678	754	1421	1550	1619	1512	1657
Sudan	504	634	738	784	720	495	666	751	799	733
Tunisia	413	389	424	460	...	897	904	992	1110	1054
WEST AFRICA	4431	4575	3276	2966	2983	6762	6959	5152	5370	5197
Benin	184	234	278	294	315	86	114	141	137	143
Burkina Faso	53	61	57	69	76	132	176	171	210	244
Cape Verde	13	14	14	15	18	10	10	10	11	13
Cote d'Ivoire	466	555	559	584	555	693	702	755	771	747
Gambia	13	13	13	18	17	23	23	22	29	28
Ghana	118	92	84	102	94	780	1000	1071	1091	987
Guinea	126	99	84	96	73	461	296	232	253	166
Guinea Bissau	2	3	1	2	2	80	51	20	13	17
Liberia	71	75	75	79	83	114	110	109	110	114
Mali	54	51	73	94	114	96	90	118	170	199
Mauritania	60	67	75	82	82	91	99	105	109	104
Niger	50	62	64	73	66	93	116	110	139	132
Nigeria	2883	2929	1560	1067	1089	3672	3759	1845	1800	1766
Senegal	181	182	191	246	253	327	317	326	404	395
Sierra Leone	110	83	94	79	64	37	35	28	27	22
Togo	48	52	53	65	82	67	61	70	95	118
CENTRAL AFRICA	1005	1070	1268	1336	1331	2045	2223	2638	2973	2881
Burundi	25	31	30	29	31	137	157	151	152	164
Cameroon	482	486	658	685	639	587	634	1008	842	979
Central African Republic	25	27	39	45	54	93	89	131	140	145
Chad	15	14	12	13	22	36	38	39	38	86
Congo	152	195	236	237	256	221	298	387	402	420
Equatorial Guinea	1	1	1	2	2	16	16	18	19	19
Gabon	166	178	157	180	170	379	428	377	443	422
Rwanda	93	96	102	111	114	133	133	137	148	149
Sao Tome and Principe	3	3	4	4	4	9	9	9	9	10
Zaire	42	38	30	31	38	433	422	381	780	487
EAST AND SOUTHERN AFRICA	2449	2717	2916	2873	2829	3055	2980	3194	3352	3489
Angola	259	290	322	361	371	646	707	774	831	847
Botswana	22	24	27	25	36	151	142	186	185	278
Comoros	5	7	7	8	9	21	29	31	37	40
Djibouti	39	43	44	45	46	98	104	108	103	104
Ethiopia	296	347	344	348	383	382	386	419	450	481
Kenya	403	464	511	488	472	183	220	249	208	204
Lesotho	6	8	13	13	13	25	27	30	38	37
Madagascar	165	189	188	175	179	217	249	289	278	300
Malawi	58	67	65	74	85	104	120	117	202	227
Mauritius	99	132	140	161	180	94	116	137	173	174
Mozambique	171	205	182	130	108	51	62	55	40	33
Seychelles	34	28	34	43	46	27	24	34	37	39
Somalia	73	74	77	79	73	21	20	17	14	12
Swaziland	20	25	28	32	36	48	59	65	72	81
Tanzania, United Rep. of	301	258	331	272	158	311	198	169	134	76
Uganda	100	97	132	127	129	233	117	97	83	79
Zambia	128	93	83	87	112	146	74	62	64	60
Zimbabwe	270	364	388	403	392	298	324	363	406	417
TOTAL AFRICA	14353	15844	15922	16042	15380	23972	26001	25037	26062	25778

Table 6. Gross domestic product by kind of economic activity at current factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Other services				
	1985	1986	1987	1988	1989
NORTH AFRICA	4660	4910	5407	5535	5533
Algeria	579	691	746	782	779
Egypt	803	908	1132	1181	1058
Libyan Arab Jamahiriya	1504	1369	1467	1543	1608
Morocco	1089	1210	1260	1189	1314
Sudan	120	160	177	189	173
Tunisia	565	572	624	652	601
WEST AFRICA	2151	2032	2030	2143	2134
Benin	9	11	13	15	17
Burkina Faso	4	9	9	11	1
Cape Verde	1	1	1	1	1
Cote d'Ivoire	1171	997	1197	1270	1238
Gambia	4	4	4	6	6
Ghana	83	104	98	98	88
Guinea	55	34	28	30	21
Guinea-Bissau	24	15	17	11	12
Liberia	31	31	34	36	37
Mali	22	21	30	36	42
Mauritania	20	22	24	26	25
Niger	105	130	134	157	169
Nigeria	448	486	266	231	224
Senegal	131	132	136	175	184
Sierra Leone	21	17	13	13	10
Togo	23	19	24	30	42
CENTRAL AFRICA	983	705	762	1062	850
Burundi	15	16	18	21	22
Cameroon	154	162	220	220	213
Central African Republic	3	3	2	5	5
Chad	3	3	3	3	7
Congo	126	145	173	186	170
Equatorial Guinea	-	-	-	-	-
Gabon	41	41	36	40	40
Rwanda	53	53	56	67	68
Sao Tome and Principe	-	-	-	-	-
Zaire	288	281	254	519	325
EAST AND SOUTHERN AFRICA	2934	3080	3205	3342	3354
Angola	162	169	176	191	201
Botswana	30	29	34	32	48
Comoros	1	1	1	1	1
Djibouti	9	9	10	10	11
Ethiopia	289	279	300	316	339
Kenya	902	1103	1148	1142	1160
Lesotho	28	31	37	44	45
Madagascar	163	184	183	170	172
Malawi	46	51	50	57	64
Mauritius	47	58	58	65	70
Mozambique	11	12	10	7	6
Seychelles	5	5	5	6	7
Somalia	34	33	35	39	36
Swaziland	10	11	12	14	15
Tanzania, United Rep. of	150	138	134	106	61
Uganda	109	60	76	68	58
Zambia	203	110	86	94	81
Zimbabwe	737	798	650	962	981
TOTAL AFRICA	10428	10727	11404	12083	11871

Table 7. Gross domestic product by kind of economic activity at constant 1980 factor cost, 1985-1989

(Millions of dollars)

Subregion, country	Total					Agriculture				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	128445	132213	132243	136021	139446	14554	15753	15970	16601	17195
Algeria	40651	40448	40649	40041	40869	2727	2614	2639	2372	2420
Egypt	25193	27486	28640	30271	30726	4320	4829	4971	5129	5206
Libyan Arab Jamahiriya	27737	27430	25812	26407	27150	878	986	1020	1044	1108
Morocco	18134	19503	18889	20758	21298	3416	3629	3399	3689	3636
Sudan	7402	8158	8558	8704	9288	1712	2170	2218	2598	2886
Tunisia	9328	9189	9694	9840	10115	1501	1526	1722	1770	1940
WEST AFRICA	89966	93430	94670	98061	100682	31693	34053	34639	35700	36718
Benin	1212	1196	1151	1199	1260	442	467	426	458	498
Burkina Faso	1795	1853	1872	1897	1906	822	795	789	807	786
Cape Verde	181	187	208	224	236	40	41	45	48	50
Cote d'Ivoire	10277	10801	10153	9848	9430	2514	2651	2622	2650	2658
Gambia	232	246	272	285	297	68	77	106	110	120
Ghana	13665	14373	15051	15993	16792	6992	7223	7223	7485	7460
Guinea	4083	4246	4416	4512	4626	1976	2071	2091	2104	2136
Guinea-Bissau	248	259	271	286	302	129	142	152	159	168
Liberia	805	787	805	825	808	240	242	263	274	269
Mali	1552	1738	1757	1845	1933	785	956	953	1000	1045
Mauritania	633	646	673	687	709	160	180	182	194	195
Niger	1960	2091	1939	2079	2126	866	993	892	1026	1036
Nigeria	48471	50024	50924	53010	54761	15335	16844	17466	17965	18872
Senegal	2778	2904	3010	3168	3265	593	653	671	703	723
Sierra Leone	1181	1155	1199	1195	1183	433	414	447	406	386
Togo	894	923	969	1008	1049	298	305	310	312	316
CENTRAL AFRICA	24757	24812	23995	23453	23339	6513	6560	6372	6053	6061
Burundi	1058	1105	1078	1114	1140	605	620	588	591	602
Cameroon	8864	9442	9024	8274	7811	2301	2321	2187	1772	1723
Central African Republic	902	914	925	939	956	381	391	393	421	430
Chad	761	783	802	866	906	352	360	353	380	390
Congo	2033	1972	2045	2031	2087	245	240	248	238	239
Equatorial Guinea	39	41	43	45	46	16	16	17	18	18
Gabon	3962	3270	2693	2605	2659	262	230	190	196	197
Rwanda	1174	1151	1156	1191	1225	474	465	463	477	490
Sao Tome and Principe	30	30	29	31	32	7	7	7	7	7
Zaire	5934	6105	6199	6358	6477	1869	1910	1926	1953	1965
EAST AND SOUTHERN AFRICA	39178	40587	42227	44164	45826	13060	13543	13900	14578	14874
Angola	3199	3320	3415	3524	3551	1464	1487	1519	1570	1536
Botswana	1336	1442	1595	1724	1822	56	62	63	66	69
Comoros	156	159	164	168	172	66	68	70	72	74
Djibouti	235	239	246	248	252	7	7	7	7	8
Ethiopia	3738	3987	4344	4501	4633	1534	1675	1917	1902	1961
Kenya	6113	6455	6772	7124	7480	1913	2095	2047	2245	2333
Lesotho	342	350	376	422	439	66	63	67	84	87
Madagascar	2867	2923	3016	3041	3154	1223	1245	1297	1300	1338
Malawi	1224	1238	1275	1321	1373	468	469	475	471	492
Mauritius	1202	1308	1418	1499	1562	176	195	189	179	174
Mozambique	1028	1072	1115	1176	1236	481	493	514	525	562
Seychelles	126	127	133	141	151	12	12	12	12	13
Somalia	971	1002	1055	1046	1067	579	572	616	629	612
Swaziland	548	597	604	659	690	140	156	151	153	155
Tanzania, United Rep. of	3344	3445	3579	3726	3867	1703	1768	1870	1951	1990
Uganda	2810	2818	2999	3215	3426	1556	1560	1649	1741	1833
Zambia	3939	3970	4058	4167	4171	647	705	691	734	687
Zimbabwe	6001	6134	6064	6461	6778	970	910	746	935	951
TOTAL AFRICA	282346	291043	293134	301700	309293	65819	69909	70881	72932	74848

Table 7. Gross domestic product by kind of economic activity at constant 1980 factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Mining and quarrying					Manufacturing				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	35624	34312	33472	33799	34390	13799	14361	14178	14600	15408
Algeria	13820	13409	13476	13010	13092	3966	3964	4066	3767	3970
Egypt	4554	4884	5080	5436	5517	3097	3110	3169	3414	3466
Libyan Arab Jamahiriya	15333	14029	13043	13343	13691	1104	1226	1283	1314	1462
Morocco	905	973	848	1005	1072	3435	3802	3215	3585	3738
Sudan	10	10	10	10	10	740	774	812	790	952
Tunisia	1002	1007	1015	995	1007	1457	1485	1633	1738	1820
WEST AFRICA	12900	12766	11886	12780	12600	7819	8055	8315	8772	8989
Benin	76	51	55	55	61	56	65	67	74	77
Burkina Faso	14	22	23	23	23	250	280	274	270	272
Cape Verde	1	1	1	1	1	12	13	14	15	17
Cote d'Ivoire	309	312	310	291	270	1225	1413	1319	1328	1254
Gambia	-	-	-	-	-	11	12	17	18	18
Ghana	159	154	167	225	230	1271	1409	1553	1696	1723
Guinea	595	622	647	657	673	173	179	134	143	150
Guinea Bissau	-	-	-	-	-	4	4	4	4	4
Liberia	99	98	88	88	83	63	61	62	68	68
Mali	40	40	41	43	45	100	105	98	99	104
Mauritania	97	84	98	95	101	31	34	36	38	41
Niger	222	213	195	196	196	76	77	75	73	74
Nigeria	11032	10897	9973	10815	10611	3902	3739	3965	4173	4406
Senegal	93	96	96	98	103	521	539	570	623	632
Sierra Leone	72	82	86	72	67	50	48	45	67	66
Togo	90	94	106	122	135	75	76	82	83	84
CENTRAL AFRICA	5090	4931	4742	5009	4953	1952	2106	2032	1881	1849
Burundi	1	2	2	2	3	80	82	83	88	91
Cameroon	1209	1278	1236	1428	1329	1060	1269	1243	1070	1001
Central African Republic	25	24	25	29	30	84	70	65	85	87
Chad	4	4	4	4	4	65	68	69	75	81
Congo	641	648	675	665	670	142	146	140	140	150
Equatorial Guinea	-	-	-	-	-	2	2	2	2	2
Gabon	1537	1250	1018	1026	1025	258	205	171	155	162
Rwanda	4	4	4	4	4	109	106	106	107	109
Sao Tome and Principe	-	-	-	-	-	3	3	3	3	3
Zaire	1667	1722	1777	1850	1889	150	156	151	157	163
EAST AND SOUTHERN AFRICA	2544	2624	2804	2902	2969	5314	5496	5790	6104	6439
Angola	725	826	857	874	892	81	74	78	81	84
Botswana	665	669	781	853	877	42	53	59	62	66
Comoros	-	-	-	-	-	6	6	7	7	7
Djibouti	-	-	-	-	-	11	13	13	13	14
Ethiopia	7	7	5	6	6	482	503	528	540	551
Kenya	16	16	18	20	21	855	887	965	1004	1064
Lesotho	3	3	2	1	1	36	42	47	56	60
Madagascar	10	10	10	11	11	291	300	309	312	325
Malawi	-	-	-	-	-	165	162	167	146	152
Mauritius	2	2	2	2	2	216	259	298	323	346
Mozambique	3	3	3	3	3	228	234	249	270	283
Seychelles	-	-	-	-	-	11	11	11	13	14
Somalia	4	4	4	4	4	66	68	70	76	77
Swaziland	15	14	14	15	15	119	140	136	169	179
Tanzania, United Rep. of	27	23	23	21	21	279	264	278	293	302
Uganda	2	2	2	2	2	154	145	169	208	246
Zambia	611	582	608	624	633	845	855	906	958	973
Zimbabwe	455	463	474	466	479	1425	1479	1499	1574	1697
TOTAL AFRICA	56158	54633	52903	54490	54911	28885	30018	30315	31365	32685

Table 7. Gross domestic product by kind of economic activity at constant 1980 factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Electricity, gas and water					Construction				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	2653	2932	2981	3105	3277	11103	11108	10674	10873	11008
Algeria	641	670	686	719	732	6038	6024	6022	6126	6260
Egypt	921	1083	1073	1156	1173	174	221	244	261	266
Libyan Arab Jamahiriya	301	324	328	334	372	2621	2465	2199	2249	2222
Morocco	301	375	356	390	424	1272	1432	1199	1286	1371
Sudan	300	324	324	276	332	378	360	368	356	378
Tunisia	190	196	215	230	244	620	605	642	595	511
WEST AFRICA	757	691	732	754	767	2633	2803	2852	2915	2975
Benin	7	8	8	8	8	65	65	68	68	69
Burkina Faso	9	8	10	10	11	114	166	215	223	235
Cape Verde	5	5	6	6	7	33	35	39	43	46
Cote d'Ivoire	57	63	97	104	95	383	407	427	403	379
Gambia	1	1	-	-	-	8	9	10	11	11
Ghana	80	94	111	120	121	326	319	367	384	388
Guinea	8	10	10	11	12	96	96	155	164	170
Guinea Bissau	6	5	5	5	6	4	4	4	4	5
Liberia	23	23	24	24	24	28	25	25	26	26
Mali	15	16	19	20	22	72	77	81	84	90
Mauritania	5	6	6	7	7	44	40	42	41	42
Niger	18	18	17	17	18	72	78	74	67	71
Nigeria	446	354	331	329	342	1089	1179	1025	1069	1103
Senegal	51	50	56	58	60	209	216	229	243	257
Sierra Leone	4	4	3	2	2	43	45	47	36	34
Togo	21	25	31	32	33	45	41	45	48	51
CENTRAL AFRICA	208	219	194	196	200	1512	1469	1252	1236	1246
Burundi	3	3	4	4	4	51	50	56	59	61
Cameroon	92	111	94	101	100	559	577	412	409	388
Central African Republic	3	4	4	4	4	20	19	17	22	24
Chad	4	4	4	4	4	13	13	13	14	15
Congo	18	17	19	18	19	105	110	108	115	120
Equatorial Guinea	-	-	-	-	-	2	2	2	2	3
Gabon	79	72	61	57	60	397	324	264	230	242
Rwanda	2	2	2	2	2	91	90	91	94	97
Sao Tome and Principe	1	1	1	1	1	3	3	3	3	3
Zaire	5	5	5	5	5	269	280	285	287	293
EAST AND SOUTHERN AFRICA	654	703	761	767	875	1419	1442	1509	1547	1573
Angola	13	14	14	15	16	56	48	49	52	54
Botswana	28	37	42	45	47	42	35	40	55	67
Comoros	1	1	1	1	1	14	13	14	14	15
Djibouti	9	9	9	9	10	12	12	12	13	13
Ethiopia	39	42	44	47	49	171	173	179	173	174
Kenya	142	147	160	167	179	320	312	334	337	355
Lesotho	3	3	2	4	4	50	40	47	54	55
Madagascar	45	46	48	50	51	107	110	115	115	117
Malawi	21	21	20	24	25	71	85	89	75	78
Mauritius	36	39	41	41	45	77	85	92	103	107
Mozambique	44	50	51	56	59	80	81	81	88	73
Seychelles	2	2	1	2	2	9	10	10	10	10
Somalia	1	2	6	37	7	31	33	44	39	39
Swaziland	7	7	7	8	9	17	19	19	21	22
Tanzania, United Rep. of	43	44	49	50	50	85	98	102	107	107
Uganda	2	2	2	2	2	37	32	42	54	58
Zambia	91	90	79	82	83	139	146	140	133	135
Zimbabwe	125	149	194	201	235	101	109	101	106	92
TOTAL AFRICA	4272	4544	4669	4822	5120	16666	16822	16287	16572	16801

Table 7. Gross domestic product by kind of economic activity at constant 1980 factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Commerce					Transport and communications				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	23540	24341	25141	26136	26575	7548	8287	8665	8987	9216
Algeria	5892	5974	6000	6172	6333	2012	2106	2213	2260	2362
Egypt	7423	7789	8221	8657	8787	2189	2789	2890	3063	3109
Libyan Arab Jamahiriya	2462	2594	2567	2624	2661	1040	1111	1071	1094	1111
Morocco	3409	3575	3725	4170	4286	950	986	1120	1200	1246
Sudan	2216	2320	2512	2400	2350	828	830	894	886	900
Tunisia	2139	2090	2116	2114	2158	528	465	478	484	489
WEST AFRICA	17940	18640	19476	20032	20666	4713	4626	4756	4914	5039
Benin	229	219	212	211	214	218	203	199	209	215
Burkina Faso	335	304	295	292	299	76	77	72	74	75
Cape Verde	50	51	57	62	65	22	23	25	27	28
Cote d'Ivoire	2265	2316	1690	1388	1282	658	790	802	836	795
Gambia	56	58	60	64	64	25	26	25	28	29
Ghana	2704	2950	3287	3542	3589	569	601	667	735	761
Guinea	587	603	712	753	785	108	128	134	138	144
Guinea-Bissau	53	54	56	57	59	1	1	1	1	1
Liberia	126	121	129	133	130	72	71	69	71	71
Mali	287	288	298	311	323	74	76	77	84	91
Mauritania	117	120	123	127	128	63	65	66	69	72
Niger	355	359	353	365	382	76	77	74	72	73
Nigeria	9801	10197	11192	11643	12215	2292	2043	2095	2103	2213
Senegal	494	511	509	539	558	231	239	254	269	277
Sierra Leone	313	317	321	354	369	156	126	115	113	105
Togo	170	173	183	193	204	72	80	80	85	90
CENTRAL AFRICA	4938	4990	4921	4805	4751	1222	1245	1200	1165	1159
Burundi	128	1	141	148	152	27	28	29	29	30
Cameroon	2299	2406	2379	2288	2156	502	549	523	476	447
Central African Republic	219	230	241	210	213	38	40	43	38	38
Chad	204	208	223	244	255	15	15	16	18	19
Congo	217	215	233	208	222	207	206	213	222	231
Equatorial Guinea	5	5	5	5	6	1	1	1	1	1
Gabon	644	535	443	414	429	222	186	156	153	158
Rwanda	244	235	239	245	252	83	86	87	90	93
Sao Tome and Principe	3	4	3	4	4	3	4	4	4	4
Zaire	975	1006	1012	1041	1063	123	130	130	134	138
EAST AND SOUTHERN AFRICA	7359	7714	8124	8495	8784	2387	2500	2572	2684	2778
Angola	182	185	190	195	201	165	171	177	183	188
Botswana	239	305	300	319	306	34	46	47	48	49
Comoros	31	32	33	33	33	7	7	7	7	8
Djibouti	83	84	85	85	86	32	32	32	33	33
Ethiopia	686	725	774	803	794	227	254	255	266	279
Kenya	1619	1698	1839	1897	1997	339	347	372	380	392
Lesotho	93	99	108	117	127	10	13	15	16	17
Madagascar	336	340	348	350	364	210	215	219	224	228
Malawi	267	282	301	329	337	81	79	88	90	96
Mauritius	352	373	418	450	471	134	143	158	170	179
Mozambique	57	58	60	65	71	99	112	114	124	135
Seychelles	38	34	41	46	49	28	33	30	33	35
Somalia	191	218	223	228	224	61	64	65	71	70
Swaziland	112	115	116	126	131	32	36	36	39	41
Tanzania, United Rep. of	663	718	757	783	792	221	217	226	240	243
Uganda	659	660	705	763	814	132	144	149	160	179
Zambia	775	769	797	802	814	202	204	211	207	210
Zimbabwe	975	1018	1029	1103	1169	374	386	370	392	397
TOTAL AFRICA	53777	55684	57662	59468	60776	15870	16658	17193	17749	18192

Table 7. Gross domestic product by kind of economic activity at constant 1980 factor cost, 1985-1989
(Continued)

(Millions of dollars)

Subregion, country	Public administration and defence					Other services				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	13995	15194	14938	15416	15801	6080	6389	6717	7011	7112
Algeria	5046	5161	5003	5052	5120	509	527	545	565	580
Egypt	1419	1596	1714	1826	1853	1096	1186	1274	1330	1350
Libyan Arab Jamahiriya	2246	2820	2452	2509	2597	1753	1874	1851	1895	1922
Morocco	3073	3293	3367	3636	3738	1825	1942	2155	2314	2327
Sudan	1024	1176	1214	1176	1254	194	194	206	212	226
Tunisia	1188	1148	1188	1217	1239	704	667	685	696	706
WEST AFRICA	9181	9517	9744	9985	10061	2957	2942	2990	2980	2943
Benin	108	108	107	106	106	11	10	10	10	11
Burkina Faso	191	221	215	218	226	5	11	11	12	13
Cape Verde	16	16	18	19	20	2	2	2	2	2
Cote d'Ivoire	1043	1117	1182	1194	1112	1823	1731	1704	1654	1585
Gambia	53	55	44	45	46	8	8	8	8	8
Ghana	1876	1919	1976	2136	2171	228	272	323	347	350
Guinea	490	480	474	481	491	51	58	59	62	65
Guinea-Bissau	40	37	38	43	47	12	12	12	12	13
Liberia	139	134	135	135	133	27	25	26	22	22
Mali	150	151	161	172	180	29	29	30	33	34
Mauritania	96	96	98	95	97	21	21	22	22	24
Niger	141	143	128	132	141	159	160	156	156	161
Nigeria	4230	4412	4507	4540	4618	345	358	369	374	382
Senegal	419	427	443	445	454	167	173	181	191	201
Sierra Leone	94	102	118	122	114	40	43	46	45	42
Togo	95	98	101	103	106	30	30	30	30	30
CENTRAL AFRICA	2555	2519	2528	2386	2413	887	871	854	834	822
Burundi	145	155	156	174	177	17	17	18	20	20
Cameroon	734	775	812	632	596	202	230	214	187	164
Central African Republic	128	133	133	126	127	4	5	4	4	4
Chad	97	103	111	117	129	8	8	9	9	9
Congo	271	245	268	288	298	186	146	141	139	137
Equatorial Guinea	13	14	14	15	15					
Gabon	507	424	354	340	353	55	42	35	33	34
Rwanda	125	121	122	127	131	42	42	43	45	47
Sao Tome and Principe	9	9	9	9	10	...	...	...	...	...
Zaire	526	539	548	557	577	373	381	388	398	406
EAST AND SOUTHERN AFRICA	3476	3474	3612	3828	3993	3575	3679	3809	3951	4116
Angola	410	416	430	453	476	103	99	101	102	104
Botswana	205	217	244	265	278	51	57	60	63	63
Comoros	31	31	32	33	33	1	1	1	1	1
Djibouti	87	89	94	95	95	5	5	5	5	5
Ethiopia	322	325	343	450	497	270	284	298	313	320
Kenya	234	240	282	253	259	881	923	987	1064	1139
Lesotho	47	52	52	55	55	58	63	66	70	73
Madagascar	438	447	456	465	493	207	209	213	216	227
Malawi	100	93	87	136	140	50	47	48	51	53
Mauritius	140	142	146	150	155	70	72	76	80	84
Mozambique	29	34	35	38	41	6	6	7	7	8
Seychelles	23	22	25	24	25	4	4	2	2	2
Somalia	30	32	28	25	25	30	31	32	35	34
Swaziland	102	103	103	107	114	20	20	21	22	23
Tanzania, United Rep. of	218	179	182	170	168	178	168	171	194	195
Uganda	199	201	203	206	208	69	72	76	79	83
Zambia	274	267	259	259	263	387	382	397	399	405
Zimbabwe	588	585	610	646	666	1185	1236	1250	1250	1297
TOTAL AFRICA	29206	30705	30822	31615	32267	13498	13881	14369	14777	14993

Table 8. Structure of gross domestic product by main sectors at current factor cost, 1985-1989

Subregion, country	(Percent)									
	Agriculture					Services				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	10.72	12.07	13.29	13.16	12.93	41.80	45.48	45.34	46.11	46.64
Algeria	7.64	7.96	7.78	7.16	7.09	35.21	39.03	38.09	39.62	40.82
Egypt	16.01	14.21	21.13	20.67	20.67	51.23	54.23	51.52	51.52	51.51
Libyan Arab Jamahiriya	3.17	5.25	5.71	5.71	5.89	37.68	46.50	46.59	46.58	46.19
Morocco	20.46	23.27	18.65	18.61	17.99	53.71	52.00	55.98	56.35	57.21
Sudan	29.12	33.49	32.59	32.59	32.59	52.98	49.95	51.10	51.09	51.10
Tunisia	16.59	17.42	18.74	19.12	19.23	49.62	48.72	47.72	47.04	46.45
WEST AFRICA	35.81	36.62	32.65	36.94	36.73	38.10	39.36	35.95	37.38	36.94
Benin	37.97	42.13	38.66	39.89	39.99	46.45	45.86	49.00	47.65	47.14
Burkina Faso	44.01	42.00	42.08	42.05	41.58	34.83	33.43	32.92	32.85	32.76
Cape Verde	21.65	20.64	21.09	20.77	21.23	50.20	50.39	50.34	50.50	50.78
Cote d'Ivoire	26.77	27.09	26.08	26.60	26.93	54.16	52.75	52.78	51.83	51.74
Gambia	23.60	27.58	27.04	27.04	28.58	57.53	57.04	56.50	56.49	55.29
Ghana	42.31	40.60	43.63	42.85	40.75	47.97	49.44	48.56	48.32	42.83
Guinea	50.55	49.05	48.50	47.82	47.39	29.65	30.15	30.61	31.65	30.55
Guinea-Bissau	49.46	47.80	52.35	45.63	45.51	44.55	33.33	37.06	41.43	41.58
Liberia	36.62	36.71	38.52	39.15	39.20	42.40	43.34	41.98	42.92	43.40
Mali	49.08	55.29	54.66	53.96	54.06	34.02	29.52	29.97	30.59	30.65
Mauritania	27.19	29.49	29.60	29.98	30.73	46.89	46.85	46.91	47.09	46.72
Niger	47.34	49.86	48.39	51.80	49.65	37.41	35.86	36.69	35.10	37.49
Nigeria	35.05	36.31	29.58	36.30	36.60	35.36	37.31	30.56	31.60	31.57
Senegal	20.29	21.64	21.28	21.50	20.58	50.26	49.68	48.99	48.75	49.15
Sierra Leone	44.48	39.73	40.97	39.82	38.75	44.22	37.69	41.52	44.53	44.86
Togo	36.96	38.73	37.68	36.35	35.09	41.63	40.76	42.54	43.06	42.61
CENTRAL AFRICA	24.58	25.74	26.03	24.75	26.86	38.63	40.10	42.62	43.23	42.10
Burundi	60.32	56.84	53.54	52.70	52.63	26.94	30.03	30.04	30.63	30.38
Cameroon	22.71	24.24	24.37	22.77	24.04	43.13	43.87	44.61	43.07	44.37
Central African Republic	40.97	42.41	40.24	42.45	42.68	45.56	44.16	46.23	44.30	44.12
Chad	44.41	38.62	38.77	42.79	41.37	37.88	41.46	41.59	38.58	40.85
Congo	8.74	12.22	12.00	12.01	11.88	39.74	49.99	51.44	51.07	50.75
Equatorial Guinea	45.72	45.63	45.16	45.07	45.35	43.69	43.82	44.15	44.03	43.62
Gabon	6.36	8.06	8.18	8.95	9.01	33.96	39.29	40.20	40.63	40.50
Rwanda	40.96	41.20	41.44	42.07	42.84	39.27	39.47	39.31	38.63	37.93
Sao Tome and Principe	27.31	26.84	26.38	25.21	24.64	51.28	52.01	52.45	53.66	54.20
Zaire	27.43	28.22	31.33	26.12	31.33	35.79	33.29	38.05	45.52	38.05
EAST AND SOUTHERN AFRICA	39.88	39.97	39.12	38.59	35.33	41.44	41.30	42.10	42.92	43.06
Angola	46.30	49.25	47.30	46.40	45.57	30.83	33.26	35.18	35.97	35.47
Botswana	5.50	4.52	3.72	3.21	3.21	44.48	43.19	43.22	41.20	37.05
Comoros	40.60	41.94	41.94	43.10	43.65	44.24	44.15	44.80	43.94	43.71
Djibouti	2.58	2.73	2.85	2.92	2.98	90.35	90.51	89.14	88.99	88.05
Ethiopia	43.95	44.81	43.18	42.23	43.12	39.28	38.76	39.44	40.43	40.10
Kenya	32.51	33.04	31.75	31.91	30.99	54.30	54.25	55.80	56.49	56.75
Lesotho	21.16	18.91	19.72	23.98	23.97	63.10	64.36	59.63	56.92	57.73
Madagascar	43.90	42.31	42.01	41.05	40.12	39.64	40.37	41.08	41.90	42.64
Malawi	37.85	37.72	37.55	35.10	35.32	41.39	41.72	41.94	47.40	47.16
Mauritius	15.30	15.26	14.64	13.38	12.29	55.48	53.17	52.86	54.37	54.41
Mozambique	49.01	44.68	44.86	44.86	44.86	18.24	19.23	18.94	18.94	18.94
Seychelles	7.46	8.04	7.02	6.31	6.08	70.94	70.41	73.34	72.63	72.81
Somalia	66.77	62.37	64.18	68.51	65.45	27.61	29.67	29.19	28.97	27.94
Swaziland	24.65	24.11	22.29	20.74	19.97	63.04	58.12	50.03	49.15	49.61
Tanzania, United Rep. of	56.65	59.77	62.67	65.60	62.85	37.39	34.15	35.50	36.40	30.00
Uganda	68.02	71.00	70.11	67.16	66.92	28.23	24.78	24.07	25.30	25.90
Zambia	14.11	13.37	12.22	18.23	14.56	42.51	40.03	40.34	34.95	34.43
Zimbabwe	16.67	15.25	12.02	13.88	12.65	55.85	54.69	55.57	55.15	54.64
TOTAL AFRICA	24.87	25.70	23.84	24.40	23.99	40.21	42.35	42.07	43.17	43.18

Table 8. Structure of gross domestic product by main sectors at current factor cost, 1985-1989
(Continued)

Subregion, country	(Percent)									
	Industry, total					Manufacturing				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	48.05	43.07	41.98	41.31	41.11	10.61	11.80	11.68	11.34	11.72
Algeria	57.15	53.01	54.13	53.23	52.09	10.76	12.23	12.15	11.20	11.77
Egypt	32.76	31.56	27.35	27.81	27.81	12.79	12.24	10.51	10.73	10.73
Libyan Arab Jamahiriya	59.16	48.25	47.70	47.71	47.93	4.56	6.81	7.51	7.52	8.14
Morocco	31.84	30.57	31.55	31.29	31.11	17.98	17.37	18.05	17.89	17.82
Sudan	17.91	16.56	16.32	16.32	16.32	9.43	8.91	8.93	8.93	8.93
Tunisia	33.80	33.86	33.54	33.83	34.32	13.84	14.79	15.83	16.69	16.78
WEST AFRICA	26.69	24.58	32.21	26.62	26.62	10.53	11.12	9.65	9.67	9.76
Benin	15.58	12.01	12.34	12.47	12.87	4.47	3.87	3.84	4.05	4.18
Burkina Faso	23.53	27.85	28.29	28.38	28.94	15.19	16.13	16.18	16.22	16.41
Cape Verde	28.16	28.98	28.57	28.73	27.99	5.18	5.30	5.45	5.61	5.69
Cote d'Ivoire	19.07	20.16	21.14	21.57	21.33	12.82	14.20	14.06	14.38	14.19
Gambia	18.87	15.38	16.46	16.46	16.13	10.12	8.69	8.84	8.84	8.65
Ghana	19.47	17.61	16.45	16.94	16.41	14.47	12.62	11.35	11.69	11.33
Guinea	19.80	20.80	20.90	20.53	22.05	4.39	4.25	3.97	3.97	4.17
Guinea-Bissau	5.98	18.87	10.60	12.93	12.92	1.60	5.27	2.39	3.23	5.21
Liberia	25.22	24.17	23.20	23.09	22.94	6.76	6.39	7.38	7.64	7.79
Mali	16.90	15.18	15.37	15.46	15.30	8.79	7.88	7.57	7.35	7.06
Mauritania	25.92	23.66	23.50	22.93	22.55	4.98	5.35	5.45	5.52	5.67
Niger	17.87	16.75	17.39	15.46	15.08	4.01	3.91	4.06	3.70	3.76
Nigeria	29.59	26.39	39.86	32.10	31.84	10.70	11.44	9.24	8.93	9.03
Senegal	29.44	28.68	29.72	29.75	30.27	18.75	18.29	19.15	19.04	19.31
Sierra Leone	12.81	24.18	19.00	16.90	16.39	3.57	3.53	4.83	4.82	4.81
Togo	21.41	20.50	19.77	20.58	22.31	6.19	6.92	7.11	7.09	7.13
CENTRAL AFRICA	37.60	34.80	32.07	32.87	31.99	7.34	8.26	9.75	7.99	9.36
Burundi	12.74	13.13	16.41	16.67	16.99	7.90	8.52	10.99	11.45	11.71
Cameroon	36.08	33.32	32.46	36.08	33.73	10.40	11.93	13.36	10.40	13.18
Central African Republic	13.47	13.44	13.53	13.25	13.20	8.18	7.97	7.65	7.41	7.32
Chad	17.72	19.93	19.64	18.63	17.78	15.96	17.88	17.25	16.53	15.55
Congo	51.52	37.80	36.56	36.92	37.37	5.32	7.99	7.94	8.05	8.12
Equatorial Guinea	10.57	10.56	10.71	10.90	11.01	4.62	4.60	4.63	4.67	4.68
Gabon	59.69	52.65	51.62	50.42	50.50	6.35	7.42	7.58	7.16	7.28
Rwanda	19.77	19.33	19.25	19.30	19.23	11.21	11.28	11.17	11.52	11.65
Sao Tome and Principe	21.42	21.19	21.17	21.13	21.16	9.35	9.47	9.52	9.61	9.68
Zaire	37.35	39.08	31.03	28.60	31.03	1.62	1.68	1.35	1.60	1.35
EAST AND SOUTHERN AFRICA	21.24	21.37	21.79	21.96	24.07	11.58	12.20	12.48	12.59	13.22
Angola	22.87	17.49	17.53	17.63	18.96	2.90	2.82	3.00	3.03	3.15
Botswana	54.08	56.87	57.53	60.07	59.75	5.92	6.14	6.30	5.48	5.51
Comoros	15.16	13.91	13.26	12.97	12.65	3.94	3.88	3.89	3.98	3.99
Djibouti	16.11	16.00	16.27	16.50	17.28	4.58	4.52	4.73	4.73	5.22
Ethiopia	16.78	16.42	17.37	17.34	16.78	11.48	11.04	11.67	11.71	11.08
Kenya	19.10	18.58	18.61	19.30	19.95	11.73	11.89	11.63	11.78	11.67
Lesotho	29.54	28.39	30.28	29.80	29.82	11.00	12.94	14.32	14.28	14.56
Madagascar	16.46	17.31	16.92	17.05	17.24	11.36	12.16	11.80	11.91	12.09
Malawi	20.76	20.57	20.51	17.50	17.52	14.36	14.22	14.16	11.70	11.68
Mauritius	29.22	31.57	32.50	32.25	33.31	20.63	23.28	24.58	23.98	24.77
Mozambique	32.75	36.09	36.20	36.20	36.20	21.07	24.24	24.65	24.65	24.65
Seychelles	21.61	21.56	19.65	21.07	21.12	11.67	11.48	11.67	12.76	12.79
Somalia	7.68	10.12	10.10	6.15	10.25	4.98	5.51	5.22	5.44	5.40
Swaziland	26.15	29.62	27.68	30.11	30.42	16.19	19.88	18.35	20.88	21.09
Tanzania, United Rep. of	9.30	9.69	8.51	7.49	7.15	6.17	6.07	4.88	4.06	3.93
Uganda	3.76	4.22	5.82	7.54	7.19	2.41	3.27	3.86	4.61	4.10
Zambia	45.34	48.72	49.70	48.97	53.14	24.65	24.88	31.09	34.24	37.32
Zimbabwe	34.06	36.40	39.24	37.53	38.82	23.90	24.93	26.52	29.41	26.47
TOTAL AFRICA	35.82	32.86	35.15	33.61	33.73	10.45	11.35	11.10	10.80	11.25

Table 9. Annual growth rates of gross domestic product at constant 1980 factor cost, 1985-1989

(Percent)

Subregion, country	Gross domestic product, total					GDP per capita				
	1984-85	1985-86	1986-87	1987-88	1988-89	1984-85	1985-86	1986-87	1987-88	1988-89
NORTH AFRICA	3.87	2.93	0.02	2.86	2.52	0.98	0.10	-2.80	0.10	-0.20
Algeria	2.50	-0.50	0.50	-1.50	2.07	-0.53	-3.52	-2.60	-4.55	-1.07
Egypt	12.10	9.10	4.20	5.70	1.50	9.28	6.23	1.42	2.98	-1.02
Libyan Arab Jamahiriya	2.30	-1.11	-5.90	2.30	2.81	-2.05	-4.85	-9.31	-1.30	-0.79
Morocco	5.47	7.55	-3.15	9.90	2.60	2.76	4.76	-5.70	7.16	0.12
Sudan	-11.50	10.21	4.90	1.71	6.71	-14.18	7.08	1.93	-1.08	3.55
Tunisia	5.30	-1.50	5.50	1.50	2.80	2.64	-3.89	2.92	-0.87	0.48
WEST AFRICA	6.69	3.85	1.33	3.58	2.67	3.31	0.57	-2.06	0.38	-0.57
Benin	-2.22	-1.33	-3.71	4.17	5.04	-5.08	-4.35	-6.64	1.12	1.48
Burkina Faso	8.32	3.24	1.04	1.34	0.44	6.05	0.44	-1.75	-1.33	2.25
Cape Verde	8.86	3.24	11.01	8.17	5.14	6.60	0.73	7.78	5.20	2.23
Cote d'Ivoire	4.50	5.10	-6.00	-3.00	-4.25	0.20	0.90	-9.89	-6.92	-8.14
Gambia	0.51	6.10	10.70	4.90	4.06	-2.51	2.89	7.81	1.74	1.43
Ghana	3.89	5.18	4.71	6.26	5.00	0.19	1.79	1.39	3.10	1.86
Guinea	3.10	4.00	4.00	2.17	2.51	0.60	1.49	1.47	-0.29	0.00
Guinea Bissau	-3.02	4.43	4.51	5.39	5.81	-5.10	2.51	2.45	3.07	3.64
Liberia	-1.09	-2.20	2.30	2.40	-2.04	-4.15	-5.41	-0.86	-0.87	4.94
Mali	-0.88	12.00	1.10	4.98	4.78	-3.52	8.85	-1.91	1.95	1.91
Mauritania	1.99	2.01	4.20	2.00	3.21	-0.55	0.84	1.40	-0.83	0.56
Niger	4.31	6.69	-7.25	7.19	2.30	1.27	3.75	-9.94	4.01	0.97
Nigeria	9.40	3.21	1.80	4.10	3.30	5.82	-0.20	-1.58	0.60	-0.20
Senegal	3.24	4.55	3.63	5.27	3.05	0.70	1.86	0.91	2.48	0.22
Sierra Leone	10.02	-2.20	3.80	-0.30	-1.00	7.33	-4.35	0.97	-2.57	-3.63
Togo	1.89	3.20	5.00	4.01	4.13	-0.98	0.00	1.99	0.65	0.97
CENTRAL AFRICA	4.69	0.22	-3.29	-2.26	-0.49	1.80	-3.02	-6.23	-5.26	-3.51
Burundi	3.80	4.50	-2.50	3.40	2.30	0.90	1.34	-5.29	0.47	-0.46
Cameroon	8.76	6.52	-4.43	-8.31	-5.60	6.08	2.98	-7.56	-11.31	8.82
Central African Republic	3.66	1.30	1.20	1.50	1.80	1.16	-0.86	-1.44	-0.88	-0.89
Chad	6.01	2.85	2.49	7.95	4.65	4.11	0.00	0.00	5.26	2.50
Congo	3.30	-3.00	3.70	-0.70	2.78	0.69	-5.56	0.82	-3.32	0.00
Equatorial Guinea	6.55	3.62	4.67	4.92	3.50	4.17	0.80	2.38	2.33	1.52
Gabon	0.90	17.47	-17.62	-3.30	2.09	-3.11	-20.39	-20.49	6.48	1.34
Rwanda	3.00	-2.00	0.50	3.00	2.81	-0.52	-5.21	-2.75	-0.57	0.57
Sao Tome and Principe	-1.55	0.91	-3.51	5.01	5.50	-4.15	-1.81	-6.25	2.35	2.30
Zaire	2.49	2.88	1.55	2.57	1.86	-0.52	0.00	-1.55	-1.05	-1.06
EAST AND SOUTHERN AFRICA	3.28	3.60	4.04	4.59	3.76	0.43	0.43	0.85	1.69	0.42
Angola	4.59	3.79	2.85	3.20	0.76	1.96	1.37	0.00	0.54	2.15
Botswana	8.10	7.99	10.60	8.07	5.70	4.29	4.20	6.82	4.35	2.02
Comoros	2.57	1.99	3.30	2.20	2.55	-0.25	-1.50	0.76	-1.53	-1.04
Djibouti	0.57	1.45	2.88	1.00	1.61	-5.36	-4.21	2.86	-4.72	-3.30
Ethiopia	-6.95	6.68	8.95	3.61	2.93	-9.28	5.68	6.45	2.02	0.00
Kenya	5.10	5.60	4.90	5.20	5.00	0.67	1.33	0.66	0.65	0.65
Lesotho	4.08	2.30	7.25	12.29	4.10	1.36	-0.90	4.53	9.09	1.19
Madagascar	1.14	1.99	3.18	0.82	3.70	-2.10	-1.07	0.00	-2.17	0.37
Malawi	4.46	1.10	3.01	3.65	3.90	1.18	-1.75	-0.60	0.60	0.00
Mauritius	6.90	8.90	8.41	5.70	4.19	5.63	7.87	7.37	4.67	3.25
Mozambique	-7.40	4.30	4.00	5.50	5.10	-9.64	1.33	1.32	2.60	2.53
Seychelles	9.81	0.99	4.40	6.11	6.91	9.85	-0.57	4.40	4.52	5.37
Somalia	7.90	3.20	5.20	-0.80	2.00	4.11	-0.66	1.99	-4.55	-1.36
Swaziland	2.36	8.83	1.21	9.19	4.71	-1.08	5.22	-2.19	5.54	1.12
Tanzania, United Rep. of	2.60	3.00	3.90	4.10	3.80	-1.34	-0.68	0.00	0.69	0.00
Uganda	1.99	0.29	6.42	7.20	6.58	-1.63	-2.76	2.84	3.32	2.67
Zambia	6.60	0.80	2.20	2.70	0.10	2.37	-3.03	-1.47	-1.12	-3.58
Zimbabwe	7.29	2.21	-1.13	6.54	4.92	4.18	-0.97	-4.19	3.21	1.70
TOTAL AFRICA	4.74	3.08	0.72	2.92	2.52	1.70	0.00	-2.23	-0.19	-0.57

Table 10. Annual growth rates of gross domestic product at constant 1980 factor cost by main sectors, 1985-1989

(Percent)

Subregion, country	Agriculture					Services				
	1984-85	1985-86	1986-87	1987-88	1988-89	1984-85	1985-86	1986-87	1987-88	1988-89
NORTH AFRICA	0.83	8.24	1.38	3.95	3.58	3.39	5.93	2.35	3.77	2.03
Algeria	6.28	4.14	0.98	-10.14	2.04	3.01	2.28	0.05	2.09	2.47
Egypt	4.06	11.77	2.96	3.16	1.50	16.39	10.17	5.55	5.50	1.50
Libyan Arab Jamahiriya	7.44	12.31	3.43	2.32	6.15	-7.96	11.98	-5.47	2.30	2.08
Morocco	5.77	6.21	-6.33	8.53	-1.44	2.92	5.67	5.89	8.93	2.55
Sudan	-25.57	26.75	2.21	17.13	11.09	-7.35	6.05	6.77	-3.15	1.20
Tunisia	9.53	1.65	12.90	2.78	9.60	7.15	-4.13	2.22	1.00	1.80
WEST AFRICA	8.53	7.45	1.72	3.06	2.85	5.61	2.75	3.56	2.65	0.27
Benin	-5.10	5.61	-8.72	7.49	8.68	-0.01	-4.52	2.24	1.61	1.82
Burkina Faso	28.12	-3.30	-0.73	2.32	-2.60	5.46	2.63	3.24	0.59	3.00
Cape Verde	18.12	1.17	11.39	6.18	3.50	4.63	2.81	10.41	8.12	4.53
Cote d'Ivoire	-6.85	5.44	-1.07	1.08	0.30	14.30	2.87	-9.69	-5.70	-5.86
Gambia	-2.34	12.92	38.34	3.47	9.00	1.90	3.11	-6.32	5.52	0.94
Ghana	0.65	3.29	0.00	3.63	-0.33	4.78	6.61	8.95	8.16	-7.59
Guinea	1.28	4.81	0.95	0.62	1.55	-1.92	2.66	8.76	3.93	3.52
Guinea-Bissau	-3.59	10.18	6.91	4.60	5.56	-2.06	-1.44	2.14	6.74	6.37
Liberia	5.91	0.92	8.63	4.10	-2.01	-3.24	-3.24	2.64	0.70	-1.12
Mali	6.43	21.77	-0.30	4.98	4.51	4.74	0.75	3.97	5.94	4.72
Mauritania	5.15	12.49	1.20	6.37	0.65	0.71	1.70	2.42	0.92	3.14
Niger	2.28	14.62	-10.20	15.00	1.02	5.54	0.92	-3.79	2.05	4.27
Nigeria	17.86	9.84	3.69	2.85	5.05	5.85	2.06	6.78	2.73	4.12
Senegal	9.38	10.20	2.80	4.70	2.80	1.75	2.96	2.86	4.04	3.16
Sierra Leone	25.10	-4.29	7.94	-9.29	-4.84	0.06	-2.08	1.94	4.82	4.00
Togo	0.55	2.59	1.50	0.64	1.25	-2.70	3.88	3.66	4.17	4.67
CENTRAL AFRICA	3.96	0.73	-2.86	-5.01	0.13	6.98	0.06	-1.24	-3.14	0.44
Burundi	2.82	2.44	-5.17	0.44	1.93	5.66	9.71	-0.79	7.56	2.05
Cameroon	6.60	0.86	-5.79	-18.97	-2.79	11.67	5.34	-0.78	-8.35	5.91
Central African Republic	2.32	2.59	0.64	7.22	2.08	6.28	4.56	3.33	-10.33	1.12
Chad	8.91	2.08	-2.01	7.86	2.50	3.27	3.58	7.45	8.03	6.24
Congo	1.89	-2.22	3.36	-4.17	0.56	4.62	-7.84	5.32	0.05	3.84
Equatorial Guinea	10.12	3.06	4.98	6.00	2.99	4.47	4.05	4.66	4.31	4.25
Gabon	3.40	11.97	-17.30	2.67	0.57	7.33	-16.85	-16.68	4.92	3.50
Rwanda	3.62	-1.91	-0.37	3.02	2.70	2.42	-2.12	1.48	3.37	3.08
Sao Tome and Principe	4.20	-1.61	-5.12	4.75	4.12	-1.95	2.26	-3.01	5.01	5.96
Zaire	1.09	2.18	0.87	1.40	0.60	1.75	2.97	1.10	2.45	2.63
EAST AND SOUTHERN AFRICA	2.10	3.70	2.63	4.88	2.03	4.11	3.16	4.54	4.68	3.03
Angola	5.34	1.58	2.16	3.35	-2.18	2.79	1.30	3.04	3.91	3.88
Botswana	-10.93	11.57	1.45	1.29	4.90	24.14	19.50	4.33	7.64	6.63
Comoros	4.77	2.84	2.49	2.58	3.23	2.87	1.78	4.00	1.15	0.99
Djibouti	6.20	1.97	3.23	4.22	3.07	0.12	2.04	1.61	0.85	0.87
Ethiopia	-16.25	9.19	14.45	-0.78	3.10	0.97	5.46	5.24	9.69	3.27
Kenya	4.72	9.50	2.30	9.70	3.90	5.29	4.14	8.58	3.43	5.41
Lesotho	-4.13	-4.50	5.74	25.58	4.19	3.00	9.96	8.09	7.34	5.93
Madagascar	2.18	1.81	4.18	0.20	2.91	1.87	1.73	2.05	1.49	4.55
Malawi	6.63	0.21	1.10	-0.81	4.56	3.54	0.55	4.58	15.58	3.34
Mauritius	11.02	10.67	-3.01	-4.90	-3.27	3.09	4.87	9.29	6.75	4.42
Mozambique	-6.15	2.41	4.36	2.10	7.03	-4.92	9.96	2.40	8.41	9.27
Seychelles	2.55	0.92	0.39	1.03	3.07	10.30	0.27	6.68	5.50	7.27
Somalia	3.39	-1.10	7.71	2.05	-2.64	13.95	9.89	1.06	3.51	-1.71
Swaziland	8.38	11.33	-2.98	1.36	0.93	0.79	3.03	-4.46	6.54	5.83
Tanzania, United Rep. of	5.73	3.87	5.74	4.35	1.97	1.54	-2.70	7.43	3.99	-4.93
Uganda	2.46	0.30	5.69	5.60	5.30	3.31	1.77	5.32	6.49	6.29
Zambia	4.02	9.08	2.03	6.28	-6.49	3.04	-1.09	2.40	0.25	1.52
Zimbabwe	23.79	-6.19	18.06	25.42	1.69	5.16	3.09	1.29	3.92	3.77
TOTAL AFRICA	4.99	6.22	1.39	2.89	2.63	4.48	4.02	2.76	3.02	1.46

**Table 10. Annual growth rates of gross domestic product at constant 1980 factor cost
by main sectors, 1985-1989 (Continued)**

(Percent)

Subregion, country	Industry, total					Manufacturing				
	1984-85	1985-86	1986-87	1987-88	1988-89	1984-85	1985-86	1986-87	1987-88	1988-89
NORTH AFRICA	4.90	-0.74	-2.24	1.76	2.72	8.14	4.07	-1.27	3.03	5.48
Algeria	1.81	-1.62	0.76	-2.59	1.84	3.61	-0.05	2.58	-7.37	5.40
Egypt	10.68	6.30	2.87	7.33	1.50	13.51	0.42	1.88	7.76	1.51
Libyan Arab Jamahiriya	6.68	-6.79	-6.61	2.31	2.94	9.37	11.01	4.68	2.37	11.31
Morocco	8.45	10.62	-14.11	11.51	5.40	12.14	10.68	-15.43	11.49	4.28
Sudan	-2.46	2.80	3.13	-5.42	16.76	-2.12	4.60	4.91	-2.71	20.51
Tunisia	1.07	0.74	6.43	1.51	0.69	5.93	1.95	9.94	6.46	4.69
WEST AFRICA	5.62	0.85	2.18	6.04	0.43	13.63	3.01	3.23	5.50	2.48
Benin	1.81	-7.51	4.43	3.86	5.32	-3.55	16.32	3.02	9.99	4.35
Burkina Faso	3.80	23.11	9.41	0.85	2.61	6.22	11.93	2.30	-1.51	0.69
Cape Verde	9.90	5.62	11.74	9.77	7.37	18.51	2.84	12.23	8.96	8.07
Cote d'Ivoire	4.67	11.21	1.96	-1.24	-6.09	-3.80	15.38	6.66	0.68	-5.59
Gambia	0.57	4.30	28.40	7.32	1.02	4.04	3.85	43.85	5.87	0.94
Ghana	18.00	7.61	11.23	10.36	1.50	24.33	10.87	10.19	9.25	1.54
Guinea	16.30	4.07	4.31	3.04	3.10	32.38	4.01	-25.16	6.23	5.00
Guinea Bissau	4.72	-6.04	-2.66	3.65	4.18	6.19	-8.89	-1.63	5.79	5.47
Liberia	-2.69	-2.96	-3.96	3.57	-2.67	-0.63	-3.03	1.48	10.03	-0.29
Mali	7.40	5.00	0.20	2.74	6.06	0.52	5.43	6.35	0.55	4.95
Mauritania	1.40	-6.98	10.76	-0.54	6.07	7.80	10.54	4.20	7.38	7.96
Niger	6.41	-0.71	-6.34	-2.19	1.53	8.25	0.62	1.84	3.19	1.96
Nigeria	5.92	-1.82	-5.41	7.15	0.46	21.36	-4.16	6.04	5.25	5.57
Senegal	7.34	3.11	5.37	7.46	3.05	6.89	3.50	5.70	9.23	1.56
Sierra Leone	-10.14	5.11	0.53	-1.59	-4.86	-25.46	-3.82	7.14	51.28	-2.54
Togo	-2.01	2.92	11.68	7.72	6.51	3.27	1.90	8.06	0.72	2.11
CENTRAL AFRICA	2.22	-0.41	5.80	1.26	-0.89	-0.38	7.88	-3.51	-7.41	-1.71
Burundi	3.95	1.48	5.26	6.04	3.81	4.05	2.52	0.78	5.96	3.22
Cameroon	4.82	10.76	-7.70	0.72	-6.31	2.77	19.70	2.04	13.93	-6.40
Central African Republic	0.17	-11.97	-4.39	25.97	2.77	3.19	-16.57	6.92	31.13	2.44
Chad	5.03	3.21	2.08	7.98	6.66	5.39	3.90	2.01	8.53	7.10
Congo	2.42	1.49	2.36	-0.46	2.37	2.44	2.51	3.70	0.45	7.75
Equatorial Guinea	3.73	3.60	3.77	3.73	2.12	4.18	3.77	4.55	4.35	1.25
Gabon	-3.02	-18.50	-18.26	-2.98	1.38	0.05	20.53	-16.83	9.13	4.77
Rwanda	2.99	-1.92	0.17	2.04	2.39	3.39	-2.33	-0.45	1.16	1.80
Sao Tome and Principe	-5.96	0.41	-3.06	5.25	5.79	-5.83	1.55	4.06	6.88	5.94
Zaire	4.49	3.42	2.58	3.68	2.22	4.77	4.12	-3.08	4.18	3.60
EAST AND SOUTHERN AFRICA	3.93	3.37	5.84	4.20	4.73	7.84	3.42	5.35	5.44	5.48
Angola	5.16	9.93	3.74	2.33	2.44	0.08	-8.59	4.63	3.73	3.56
Botswana	-0.41	2.05	16.16	10.05	4.24	-21.43	24.55	11.92	5.44	5.57
Comoros	-4.84	0.02	3.61	4.56	5.50	3.52	5.33	3.37	4.97	4.05
Djibouti	1.72	0.36	0.52	1.78	7.36	0.49	0.40	1.06	0.57	12.14
Ethiopia	0.56	3.80	4.40	1.34	1.70	1.01	4.41	4.89	2.29	1.97
Kenya	5.04	2.13	8.37	3.48	5.93	5.62	3.73	8.76	4.00	6.01
Lesotho	18.91	-5.58	13.00	16.99	4.36	4.04	14.49	13.58	18.75	6.30
Madagascar	-3.30	3.13	3.42	0.79	3.63	-4.07	3.40	3.02	0.70	4.24
Malawi	2.45	3.78	3.42	-11.33	4.03	4.70	-1.95	3.28	-12.42	3.71
Mauritius	13.50	16.42	12.52	8.39	6.63	14.98	20.08	14.92	8.48	7.05
Mozambique	-10.29	3.81	4.44	8.42	0.32	-11.99	2.71	6.26	8.42	5.02
Seychelles	12.05	4.11	-2.84	11.63	7.28	4.01	4.15	1.57	15.85	7.26
Somalia	19.22	5.64	5.34	-26.32	54.72	13.90	4.12	2.38	8.89	1.21
Swaziland	-1.52	14.57	2.42	20.02	5.88	-1.28	18.20	-3.12	23.94	5.88
Tanzania, United Rep. of	-4.54	-1.21	5.15	4.25	1.92	-4.16	-5.67	5.55	5.26	3.03
Uganda	9.19	-7.74	19.36	23.24	16.23	-9.59	-6.06	16.94	22.76	18.54
Zambia	11.02	-0.75	3.58	3.72	1.51	37.00	1.20	5.95	5.84	1.51
Zimbabwe	6.13	4.43	3.16	3.41	6.67	11.50	3.77	1.39	4.95	7.83
TOTAL AFRICA	4.74	0.04	-1.74	2.95	2.11	8.88	3.92	0.99	3.47	4.21

Table 11. Expenditure on gross domestic product at current market prices, 1985-1989

(Millions of dollars)

Subregion, country	Total					Public consumption				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	130743	136214	145054	149894	146319	25546	27209	28100	28672	27345
Algeria	57182	60928	63488	60795	58172	9050	11377	11609	11399	10457
Egypt	22913	23486	27068	32014	29012	3826	3756	3890	4224	3794
Libyan Arab Jamahiriya	25217	21681	22335	23490	24379	8498	7144	7353	7732	7590
Morocco	12894	15533	15763	15717	17533	2043	2390	2446	2293	2515
Sudan	4711	6570	7384	7853	7210	836	1148	1324	1408	1293
Tunisia	7826	8016	9016	10024	10014	1293	1393	1478	1616	1695
WEST AFRICA	87216	88288	69721	63719	64440	8953	9229	6442	7201	6003
Benin	1113	1453	1608	1673	1768	100	138	152	153	161
Burkina Faso	1363	1667	1688	2081	2339	171	244	282	356	405
Cape Verde	114	123	122	122	141	27	34	33	33	39
Cote d'Ivoire	7022	6939	6578	6634	6290	978	1052	1087	1092	1029
Gambia	136	134	138	183	180	19	22	27	25	20
Ghana	4499	4843	5073	5511	5172	423	536	508	546	562
Guinea	2652	2252	1982	2373	2461	340	270	204	239	212
Guinea-Bissau	857	809	576	332	382	209	137	90	54	64
Liberia	1055	1037	1090	1158	1214	126	138	148	142	155
Mali	1057	1131	1697	2055	2408	125	119	187	219	253
Mauritania	633	752	839	1002	989	155	170	173	186	181
Niger	1441	1858	1863	2278	2145	147	196	201	250	247
Nigeria	61187	61107	42129	33128	33404	5569	5597	2736	3175	1906
Senegal	2375	2379	2563	3259	3370	397	413	440	534	540
Sierra Leone	961	1038	993	902	770	70	69	62	59	50
Togo	752	768	783	1029	1408	100	94	112	140	181
CENTRAL AFRICA	23795	23145	26294	28966	27966	3008	3617	3755	4594	4056
Burundi	1169	1234	1161	1092	1155	189	212	231	206	230
Cameroon	8545	8398	11749	12656	11619	769	945	1202	1294	1188
Central African Republic	680	671	930	1120	1210	91	82	105	126	135
Chad	720	599	533	627	1037	122	118	122	125	211
Congo	2161	1850	2149	2220	2347	355	462	510	439	454
Equatorial Guinea	75	78	86	89	93	22	22	25	26	28
Gabon	3664	3469	2921	3312	3486	682	878	693	735	651
Rwanda	1705	1566	1624	1736	1747	192	191	195	201	208
Sao Tome and Principe	40	44	40	40	42	19	21	19	19	20
Zaire	5036	5237	5101	6076	5228	568	685	653	1422	932
EAST AND SOUTHERN AFRICA	43460	46314	48373	49822	50736	8196	8900	9385	9847	10255
Angola	5364	5292	5898	6350	6573	1400	1437	1606	1745	1867
Botswana	912	975	1203	1264	1824	243	232	229	305	498
Comoros	115	163	171	209	229	32	45	47	56	62
Djibouti	339	355	377	389	397	132	143	131	136	138
Ethiopia	4775	5233	5409	5574	5969	929	988	1045	1341	1462
Kenya	6850	8002	8470	8411	8284	1197	1463	1577	1450	1591
Lesotho	248	273	357	429	420	62	70	84	94	88
Madagascar	2347	2671	2695	2529	2726	317	365	350	320	359
Malawi	1144	1285	1243	1429	1609	202	254	220	193	202
Mauritius	1085	1463	1586	1857	2043	125	154	183	228	233
Mozambique	2593	2479	2241	1633	1372	510	545	520	423	347
Seychelles	171	168	213	274	293	59	65	62	75	75
Somalia	1120	1093	1208	1180	1196	100	117	134	142	128
Swaziland	337	434	472	546	572	81	109	99	113	114
Tanzania, United Rep. of	5178	5290	5131	4645	2896	797	783	687	565	346
Uganda	3851	3909	4358	4841	5163	405	453	488	540	575
Zambia	2642	2039	1966	2355	3227	630	548	437	360	395
Zimbabwe	4391	5189	5375	5907	5942	976	1128	1485	1762	1777
TOTAL AFRICAL	285214	293961	289441	292401	289461	45704	48955	47682	50314	47659

Table 11. Expenditure on gross domestic product at current market prices, 1985-1989 (Continued)

(Millions of dollars)

Subregion, country	Private consumption					Gross capital formation				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	70290	78572	83718	87986	83940	37414	36773	36109	36928	36040
Algeria	26811	32325	31507	30169	27350	19392	19735	19238	18675	17792
Egypt	16364	16755	21052	25421	22778	5004	5003	5008	5630	5045
Libyan Arab Jamahiriya	9696	8453	8719	9171	9491	6657	5268	5423	5705	6067
Morocco	8943	10831	11029	10778	12337	3497	3802	3567	3716	3651
Sudan	3542	4864	5611	5968	5479	785	1077	1242	1321	1212
Tunisia	4934	5346	5800	6479	6504	2078	1888	1831	1881	2273
WEST AFRICA	67286	68597	51175	48317	50191	7736	10103	8369	8990	9338
Benin	1039	1371	1390	1493	1588	228	310	353	338	355
Burkina Faso	1168	1230	1493	1832	2040	358	570	486	586	665
Cape Verde	100	104	90	90	106	51	56	57	54	64
Cote d'Ivoire	4234	4288	4256	4392	4211	883	771	825	751	698
Gambia	104	100	124	144	114	18	25	31	33	26
Ghana	3900	3919	4000	4201	4322	431	468	680	778	801
Guinea	1982	1580	1430	1765	1823	439	385	286	505	478
Guinea-Bissau	878	698	508	288	333	158	154	131	85	99
Liberia	648	642	733	766	835	134	123	127	119	129
Mali	966	949	1401	1769	2038	232	280	398	462	561
Mauritania	504	573	633	693	657	160	173	177	180	179
Niger	1096	1404	1431	1719	1674	224	307	303	380	378
Nigeria	47500	48509	30421	25269	26318	3695	5776	3819	3873	3957
Senegal	1844	1821	1895	2412	2504	436	364	393	508	537
Sierra Leone	803	864	817	746	635	96	117	105	97	82
Togo	523	544	553	737	992	192	223	198	242	329
CENTRAL AFRICA	13753	14756	17583	18330	17663	6269	6396	6168	6879	6313
Burundi	906	914	865	838	873	167	194	201	153	168
Cameroon	5490	5463	7750	8348	7664	2127	1944	3150	3393	3115
Central African Republic	575	575	816	967	1044	80	95	145	143	163
Chad	752	619	524	586	919	60	54	55	58	91
Congo	898	1099	1203	1267	1295	654	545	506	351	380
Equatorial Guinea	44	45	50	53	56	11	11	12	13	13
Gabon	1116	1623	1421	1570	1484	1366	1562	780	969	925
Rwanda	1373	1291	1324	1413	1415	295	257	255	273	278
Sao Tome and Principe	28	31	27	27	28	10	11	9	9	9
Zaire	2572	3096	3602	3261	2885	1499	1724	1055	1519	1171
EAST AND SOUTHERN AFRICA	29794	31860	33530	34397	34651	7346	7591	8456	8596	8258
Angola	3132	3305	3705	3950	4051	504	475	514	540	567
Botswana	410	367	355	479	704	274	174	220	261	360
Comoros	83	120	125	152	166	38	38	39	45	46
Djibouti	219	232	240	258	273	87	74	89	92	93
Ethiopia	3712	4129	4179	3963	4314	667	666	789	872	861
Kenya	3971	4786	5260	5269	5062	1755	1738	2068	2132	2112
Lesotho	380	410	543	579	530	124	124	160	198	210
Madagascar	1823	2104	2048	1887	2019	329	367	377	351	356
Malawi	792	913	878	1124	1316	212	146	172	230	250
Mauritius	726	891	968	1149	1331	255	320	401	573	548
Mozambique	2213	2191	2057	1675	1373	220	206	192	156	128
Seychelles	99	94	135	178	178	39	38	40	55	55
Somalia	993	942	1027	962	882	171	213	311	254	293
Swaziland	268	270	301	355	358	108	106	155	87	87
Tanzania, United Rep. of	3998	4219	4446	4303	2657	814	1033	1171	983	549
Uganda	2934	3036	3446	3812	4064	432	372	457	505	538
Zambia	1604	1031	1175	1398	2446	393	486	273	268	199
Zimbabwe	2436	2823	2641	2903	2927	925	1014	1028	995	1002
TOTAL AFRICA	181123	193785	186005	189030	186444	58765	60864	59302	61393	59949

Table 11. Expenditure on gross domestic product at current market prices, 1985-1989 (Continued)

(Millions of dollars)

Subregion, country	Exports of goods and non factor services					Imports of goods and non factor services				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	31755	25199	27577	29731	31828	34263	31540	30650	33424	32833
Algeria	13763	8315	9382	9290	10999	11834	10824	8248	8739	8427
Egypt	4419	3708	3828	4279	3082	6700	5736	6710	7540	5688
Libyan Arab Jamahiriya	8090	7619	7844	8249	9328	7726	6803	7004	7366	8096
Morocco	2569	2620	2742	2998	3532	4158	4110	4022	4069	4502
Sudan	361	463	613	652	599	814	982	1407	1496	1374
Tunisia	2552	2474	3167	4263	4288	3031	3084	3260	4214	4747
WEST AFRICA	17024	14747	18563	15226	14935	13783	14387	14828	16016	16027
Benin	283	327	317	326	334	538	693	603	636	670
Burkina Faso	154	166	175	212	230	487	543	747	904	1001
Cape Verde	26	22	21	21	24	90	93	80	75	93
Cote d'Ivoire	3218	2700	2157	2172	2030	2291	1871	1747	1773	1677
Gambia	62	99	100	147	170	67	112	143	166	150
Ghana	456	775	1073	1134	889	710	856	1188	1149	1402
Guinea	819	782	720	770	777	928	766	658	907	829
Guinea-Bissau	100	96	75	45	52	488	277	228	141	164
Liberia	470	459	438	452	430	323	325	357	322	335
Mali	221	216	306	331	373	487	433	595	725	818
Mauritania	309	426	494	560	558	495	591	639	617	586
Niger	449	550	536	634	570	474	599	608	705	725
Nigeria	9172	7046	11094	7143	7143	4749	5821	5941	6332	5920
Senegal	822	684	659	817	813	1123	904	825	1013	1024
Sierra Leone	94	119	129	109	59	102	132	120	108	56
Togo	369	280	271	351	482	431	373	351	441	575
CENTRAL AFRICA	9133	7544	7466	7979	8219	8368	9167	8677	8816	8285
Burundi	115	137	105	128	140	207	223	242	234	256
Cameroon	1781	1791	1806	1945	1786	1620	1745	2158	2324	2134
Central African Republic	125	107	144	171	181	192	188	280	286	313
Chad	125	116	121	131	208	339	310	289	273	391
Congo	1228	737	876	1019	1084	976	993	946	857	865
Equatorial Guinea	27	27	31	33	35	27	27	32	35	39
Gabon	2083	1382	1206	1268	1492	1583	1976	1178	1230	1066
Rwanda	184	154	149	162	165	339	326	299	313	319
Sao Tome and Principe	15	15	13	14	14	32	34	29	28	28
Zaire	3450	3077	3015	3110	3115	3053	3346	3224	3236	2875
EAST AND SOUTHERN AFRICA	9822	10706	11040	11938	12173	11699	12744	14037	14956	14601
Angola	2017	1782	1782	1843	1901	1689	1706	1709	1729	1813
Botswana	533	694	1037	852	1156	548	492	639	633	900
Comoros	19	27	28	33	35	57	67	68	77	78
Djibouti	151	164	176	176	175	250	257	259	272	282
Ethiopia	549	662	623	654	695	1082	1212	1228	1255	1363
Kenya	1734	2062	1817	1875	1942	1806	2048	2252	2313	2423
Lesotho	32	35	61	82	84	350	366	491	525	491
Madagascar	335	358	377	369	364	457	524	458	399	372
Malawi	276	296	300	320	304	338	324	327	438	462
Mauritius	581	885	1052	1254	1407	601	788	1019	1347	1475
Mozambique	114	79	97	105	83	465	543	625	726	559
Seychelles	85	65	85	136	145	111	94	110	169	159
Somalia	44	56	61	33	19	187	235	326	211	126
Swaziland	215	322	288	395	437	335	374	369	404	425
Tanzania, United Rep. of	320	483	692	732	323	750	1227	1865	1937	978
Uganda	480	226	37	15	5	400	178	70	31	19
Zambia	1024	906	846	962	1076	1010	931	765	633	890
Zimbabwe	1314	1601	1679	2105	2021	1260	1377	1459	1858	1783
TOTAL AFRICA	67734	58195	64646	64875	67155	68113	67838	68193	73212	71747

Table 12. Structure of demand at current market prices, 1985-1989

(percent)

Subregion, country	Public consumption				
	1985	1986	1987	1988	1989
NORTH AFRICA	19.54	19.98	19.37	19.13	18.69
Algeria	15.03	18.67	18.29	18.75	17.98
Egypt	16.70	15.99	14.37	13.19	13.08
Libyan Arab Jamahiriya	33.70	32.95	32.92	32.92	31.13
Morocco	15.84	15.39	15.52	14.59	14.35
Sudan	17.76	17.47	17.94	17.94	17.94
Tunisia	16.93	17.38	16.40	16.12	16.93
WEST AFRICA	10.27	10.45	9.24	11.30	9.32
Benin	9.00	9.48	9.48	9.13	9.11
Burkina Faso	12.53	14.61	16.68	17.09	17.30
Cape Verde	23.76	27.44	27.41	26.09	27.73
Cote d'Ivoire	13.93	15.16	16.52	16.46	16.36
Gambia	16.03	16.13	19.19	13.63	10.98
Ghana	9.40	11.07	10.01	9.91	10.86
Guinea	12.82	11.98	10.31	10.07	8.61
Guinea-Bissau	24.36	16.98	15.59	16.37	16.67
Liberia	11.92	13.33	13.56	12.29	12.78
Mali	11.83	10.56	11.00	10.63	10.52
Mauritania	24.42	22.67	20.67	18.56	18.27
Niger	10.18	10.56	10.80	10.98	11.53
Nigeria	9.10	9.16	6.49	9.58	5.71
Senegal	16.69	17.38	17.18	16.38	16.01
Sierra Leone	7.27	6.69	6.24	6.50	6.49
Togo	13.23	12.21	14.36	13.57	12.82
CENTRAL AFRICA	12.64	15.63	14.28	15.86	14.50
Burundi	16.13	17.22	19.90	18.89	19.92
Cameroon	9.00	11.26	10.23	10.23	10.23
Central African Republic	13.35	12.21	11.29	11.25	11.18
Chad	16.96	19.78	32.93	19.93	20.30
Congo	16.45	24.95	23.74	19.78	19.33
Equatorial Guinea	28.71	28.47	29.02	29.17	30.46
Gabon	18.61	25.30	23.73	22.19	18.67
Rwanda	11.27	12.19	11.99	11.61	11.88
Sao Tome and Principe	48.07	48.35	47.88	46.87	46.21
Zaire	11.28	13.09	12.80	23.41	17.82
EAST AND SOUTHERN AFRICA	18.86	19.22	19.40	19.76	20.21
Angola	26.10	27.14	27.23	27.49	28.40
Botswana	26.68	23.79	19.05	24.16	27.30
Comoros	27.53	27.64	27.25	27.04	26.86
Djibouti	39.07	40.25	34.81	34.85	34.87
Ethiopia	19.45	18.88	19.33	24.05	24.49
Kenya	17.47	18.28	18.62	17.24	19.20
Lesotho	24.95	25.72	23.49	21.83	21.02
Madagascar	13.52	13.66	13.00	12.65	13.15
Malawi	17.64	19.80	17.73	13.50	12.54
Mauritius	11.52	10.54	11.55	12.30	11.39
Mozambique	19.69	22.00	23.19	25.90	25.28
Seychelles	34.64	38.75	29.35	27.27	25.41
Somalia	8.91	10.69	11.11	12.01	10.69
Swaziland	23.94	25.18	20.93	20.73	19.96
Tanzania, United Rep. of	15.38	14.80	13.39	12.16	11.94
Uganda	10.51	11.60	11.19	11.15	11.14
Zambia	23.85	26.85	22.21	15.26	12.25
Zimbabwe	22.23	21.75	27.63	29.83	29.90
TOTAL AFRICA	16.03	16.65	16.47	17.21	16.47

Table 12. Structure of demand at current market prices, 1985-1989 (Continued)

(percent)

Subregion, country	Private consumption					Gross capital formation				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	53.76	57.68	57.72	58.70	57.37	28.62	27.00	25.03	24.64	24.63
Algeria	46.89	53.05	49.63	49.63	47.02	33.91	32.39	30.30	30.72	30.59
Egypt	71.42	71.34	77.78	79.41	78.52	21.84	21.30	18.50	17.59	17.39
Libyan Arab Jamahiriya	38.45	38.99	39.04	39.04	38.93	26.40	24.30	24.28	24.29	24.88
Morocco	69.36	69.73	69.97	68.58	70.37	27.12	24.48	22.63	23.64	20.82
Sudan	75.20	74.03	76.00	76.00	76.00	16.66	16.40	16.82	16.82	16.82
Tunisia	63.04	66.69	64.33	64.63	64.95	26.56	23.55	20.30	18.77	22.70
WEST AFRICA	77.15	77.70	73.40	75.83	77.89	8.87	11.44	12.00	14.11	14.49
Benin	93.34	94.35	86.39	89.24	89.82	20.51	21.34	21.92	20.20	20.07
Burkina Faso	85.70	73.80	88.42	88.02	87.22	26.23	34.21	28.78	28.14	28.44
Cape Verde	87.65	84.56	73.77	73.34	75.46	45.12	45.81	46.94	44.27	45.80
Cote d'Ivoire	60.29	61.79	64.70	66.21	66.95	12.58	11.11	12.54	11.31	11.09
Gambia	76.03	74.78	89.36	78.75	63.43	13.53	18.85	22.67	18.22	14.68
Ghana	86.69	80.93	78.86	76.24	83.57	9.57	9.67	13.40	14.12	15.48
Guinea	74.73	70.16	72.14	74.40	74.09	16.57	17.11	14.44	21.29	19.43
Guinea-Bissau	102.47	86.33	88.22	86.98	87.32	18.49	19.01	22.69	25.57	25.92
Liberia	61.39	61.89	67.28	66.16	68.76	12.73	11.84	11.69	10.26	10.66
Mali	91.33	83.91	82.58	86.08	84.64	21.98	24.78	23.48	22.46	23.30
Mauritania	79.63	76.24	75.52	69.21	66.48	25.23	22.99	21.09	18.01	18.11
Niger	76.09	75.57	76.81	75.44	78.02	15.52	16.52	16.27	16.69	17.64
Nigeria	77.63	79.38	72.21	76.28	78.79	6.04	9.45	9.07	11.69	11.85
Senegal	77.63	76.54	73.95	74.03	74.31	18.36	15.30	15.35	15.59	15.93
Sierra Leone	83.53	83.30	82.31	82.70	82.49	10.03	11.27	10.61	10.70	10.68
Togo	69.57	70.85	70.58	71.63	70.43	25.49	29.07	25.28	23.53	23.34
CENTRAL AFRICA	57.80	63.75	66.87	63.28	63.16	26.35	27.63	23.46	23.75	22.57
Burundi	77.45	74.08	74.53	76.74	75.60	14.28	15.70	17.33	14.02	14.51
Cameroon	64.25	65.05	65.96	65.96	65.96	24.89	23.14	26.81	26.81	26.81
Central African Republic	84.59	85.67	87.78	86.33	86.26	11.82	14.10	15.59	12.75	13.43
Chad	104.48	103.42	98.29	93.55	88.55	8.28	9.10	10.36	9.19	8.79
Congo	41.57	59.42	55.98	57.10	55.16	30.28	29.45	23.56	15.82	16.18
Equatorial Guinea	57.72	57.47	58.58	59.15	59.69	14.49	14.36	14.38	14.34	14.25
Gabon	30.45	46.80	48.63	47.42	42.58	37.28	45.02	26.70	29.25	26.54
Rwanda	80.53	82.41	81.55	81.41	81.00	17.31	16.38	15.68	15.71	15.92
Sao Tome and Principe	70.15	70.62	68.65	66.60	65.41	25.65	25.38	23.36	21.99	21.06
Zaire	51.06	59.12	70.62	53.67	55.19	29.77	32.93	20.68	25.00	22.40
EAST AND SOUTHERN AFRICA	68.56	68.79	69.32	69.04	68.30	16.90	16.39	17.48	17.25	16.28
Angola	58.39	62.45	62.82	62.20	61.63	9.40	8.97	8.72	8.51	8.63
Botswana	44.94	37.58	29.53	37.89	38.61	30.06	17.88	18.28	20.68	20.05
Comoros	72.74	73.82	73.07	72.69	72.22	32.80	23.59	22.86	21.38	20.03
Djibouti	64.74	65.22	63.80	66.35	68.80	25.58	20.76	23.49	23.57	23.33
Ethiopia	77.73	78.89	77.26	71.10	72.28	13.97	12.72	14.59	15.64	14.43
Kenya	57.97	59.82	62.10	62.64	61.11	25.62	21.73	24.41	25.34	25.50
Lesotho	153.46	149.97	152.34	135.04	126.03	50.01	45.39	44.94	46.23	49.90
Madagascar	77.68	78.77	76.00	74.64	74.06	14.01	13.76	14.00	13.90	13.05
Malawi	69.24	71.03	70.59	78.68	81.80	18.55	11.33	13.86	16.11	15.52
Mauritius	66.90	60.91	61.06	61.87	65.14	23.47	21.89	25.28	30.85	26.81
Mozambique	85.36	88.40	91.82	102.57	100.08	8.48	8.32	8.56	9.56	9.33
Seychelles	58.15	55.84	63.37	65.10	60.67	22.70	22.79	18.62	19.96	18.61
Somalia	88.67	86.13	85.00	81.57	73.71	15.26	19.51	25.78	21.54	24.51
Swaziland	79.53	62.27	63.61	65.06	62.65	32.01	24.47	32.72	15.87	15.30
Tanzania, United Rep. of	77.21	79.74	86.66	92.63	91.74	15.72	19.52	22.82	21.17	18.95
Uganda	76.19	77.66	79.07	78.76	78.72	11.21	9.53	10.50	10.43	10.42
Zambia	60.73	50.54	59.76	59.38	75.80	14.89	23.81	13.86	11.37	6.16
Zimbabwe	55.48	54.41	49.14	49.14	49.25	21.07	19.54	19.13	16.84	16.86
TOTAL AFRICA	63.50	65.92	64.26	64.65	64.41	20.60	20.71	20.49	21.00	20.71

Table 12. Structure of demand at current market prices, 1985-1989 (Continued)

(percent)

Subregion, country	Exports of goods and non factor services					Imports of goods and non factor services				
	1985	1986	1987	1988	1989	1985	1986	1987	1988	1989
NORTH AFRICA	24.29	18.50	19.01	19.84	21.75	26.21	23.15	21.13	22.30	22.44
Algeria	24.07	13.65	14.78	15.28	18.91	20.70	17.77	12.99	14.38	14.49
Egypt	19.29	15.79	14.14	13.37	10.62	29.24	24.42	24.79	23.55	19.61
Libyan Arab Jamahiriya	32.08	35.14	35.12	35.12	38.26	30.64	31.38	31.36	31.36	33.21
Morocco	19.93	16.87	17.40	19.08	20.14	32.25	26.46	25.51	25.89	25.68
Sudan	7.67	7.05	8.30	8.30	8.30	17.28	14.94	19.05	19.05	19.05
Tunisia	32.61	30.86	35.13	42.53	42.82	38.73	38.47	36.16	42.04	47.40
WEST AFRICA	19.52	16.70	26.63	23.90	23.18	15.80	16.30	21.27	25.14	24.87
Benin	25.47	22.52	19.68	19.47	18.91	48.32	47.69	37.47	38.04	37.92
Burkina Faso	11.27	9.94	10.34	10.17	9.85	35.73	32.56	44.23	43.42	42.80
Cape Verde	22.63	17.61	17.23	17.22	17.13	79.15	75.40	65.35	61.70	66.12
Cote d'Ivoire	45.83	38.90	32.80	32.75	32.26	32.62	26.96	26.56	26.74	26.66
Gambia	45.42	73.68	71.90	80.46	94.14	49.02	83.45	103.11	91.08	83.23
Ghana	10.14	16.01	21.16	20.58	17.19	15.79	17.67	23.42	20.85	27.11
Guinea	30.89	34.75	36.30	32.46	31.57	35.00	34.00	33.19	38.21	33.69
Guinea-Bissau	11.69	11.87	13.11	13.71	13.70	57.01	34.19	39.61	42.63	43.60
Liberia	44.56	44.29	40.22	39.05	35.43	30.59	31.35	32.75	27.76	27.63
Mali	20.93	19.08	18.01	16.12	15.49	46.06	38.34	35.08	35.30	33.96
Mauritania	48.89	56.74	58.95	55.85	56.46	78.17	78.64	76.22	61.62	59.32
Niger	31.14	29.58	28.75	27.82	26.59	32.93	32.24	32.62	30.93	33.78
Nigeria	14.99	11.53	26.33	21.56	21.38	7.76	9.53	14.10	19.12	17.72
Senegal	34.59	28.77	25.72	25.09	24.13	47.27	37.98	32.20	31.08	30.37
Sierra Leone	9.75	11.49	12.96	12.10	7.67	10.57	12.75	12.11	12.00	7.33
Togo	49.08	36.46	34.58	34.16	34.21	57.37	48.59	44.80	42.88	40.80
CENTRAL AFRICA	38.38	32.59	28.39	27.55	29.39	35.17	39.61	33.00	30.44	29.63
Burundi	9.86	11.09	9.06	11.75	12.13	17.72	18.09	20.81	21.40	22.17
Cameroon	20.84	21.33	15.37	15.37	15.37	18.96	20.77	18.37	18.37	18.37
Central African Republic	18.45	15.98	15.48	15.23	14.98	28.22	27.96	30.13	25.57	25.86
Chad	17.41	19.45	22.70	20.90	20.08	47.12	51.74	54.27	43.57	37.71
Congo	56.84	39.84	40.74	45.90	46.17	45.14	53.67	44.01	38.60	36.85
Equatorial Guinea	35.17	35.08	35.57	36.80	37.31	36.08	35.38	37.54	39.46	41.70
Gabon	56.85	39.85	41.27	38.27	42.79	43.20	56.96	40.33	37.13	30.58
Rwanda	10.78	9.82	9.20	9.32	9.44	19.89	20.79	18.41	18.05	18.25
Sao Tome and Principe	37.09	33.73	33.64	34.45	32.75	80.93	78.09	73.50	69.89	65.46
Zaire	68.50	58.75	59.12	51.19	59.59	60.61	63.89	63.21	53.27	54.99
EAST AND SOUTHERN AFRICA	22.60	23.12	22.82	23.96	23.99	26.92	27.52	29.02	30.02	28.78
Angola	37.60	33.67	30.21	29.03	28.92	31.50	32.23	28.98	27.22	27.58
Botswana	58.43	71.20	86.22	67.37	63.39	60.11	50.46	53.07	50.10	49.36
Comoros	17.00	16.44	16.47	15.77	15.09	50.06	41.49	39.65	36.88	34.19
Djibouti	44.58	46.21	46.74	45.20	44.09	73.96	72.43	68.84	69.97	71.08
Ethiopia	11.50	12.66	11.52	11.73	11.64	22.65	23.15	22.70	22.52	22.84
Kenya	25.31	25.78	21.46	22.29	23.44	26.37	25.60	26.58	27.50	29.25
Lesotho	12.89	12.95	16.97	19.16	20.01	141.31	134.03	137.75	122.26	116.94
Madagascar	14.27	13.42	14.00	14.59	13.37	19.49	19.61	17.00	15.78	13.63
Malawi	24.13	23.03	24.13	22.36	18.89	29.56	25.18	26.30	30.65	28.75
Mauritius	53.53	60.50	66.33	67.51	68.86	55.42	53.84	64.22	72.53	72.20
Mozambique	4.40	3.19	4.33	6.43	6.07	17.93	21.91	27.90	44.46	40.76
Seychelles	49.51	38.84	40.19	49.47	49.62	65.00	56.22	51.53	61.80	54.31
Somalia	3.91	5.14	5.09	2.76	1.62	16.75	21.47	26.97	17.88	10.53
Swaziland	63.95	74.34	60.91	72.30	76.44	99.43	86.26	78.17	73.96	74.34
Tanzania, United Rep. of	6.18	9.13	13.48	15.75	11.15	14.49	23.19	36.34	41.71	33.77
Uganda	12.48	5.78	0.86	0.31	0.10	10.38	4.57	1.62	0.65	0.38
Zambia	38.75	44.43	43.04	40.86	33.36	38.22	45.63	38.91	26.87	27.57
Zimbabwe	29.93	30.85	31.24	35.64	34.00	28.71	26.55	27.14	31.45	30.01
TOTAL AFRICA	23.75	19.80	22.34	22.19	23.20	23.88	23.08	23.56	25.04	24.79

Table 13. Average annual growth rate of demand components, 1985-1989

(percent)

Subregion, country	Total		Public consumption		Private consumption		Gross capital formation		Exports of goods & non factor services	
	1985-89	1988-89	1985-89	1988-89	1985-89	1988-89	1985-89	1988-89	1985-89	1988-89
NORTH AFRICA	2.37	2.66	0.73	1.55	3.41	2.42	-0.04	3.14	1.65	4.28
Algeria	0.22	2.50	-0.97	3.62	0.40	1.00	0.54	3.41	1.82	3.45
Egypt	5.13	1.50	5.15	1.50	9.01	1.50	-4.84	1.51	1.15	1.51
Libyan Arab Jamahiriya	0.10	2.80	4.58	-1.88	-2.58	3.43	-0.83	6.35	0.75	4.11
Morocco	4.80	3.00	4.84	2.81	4.22	2.97	4.62	1.42	6.59	13.65
Sudan	5.87	6.70	5.73	6.77	6.12	6.36	8.62	5.81	3.27	12.68
Tunisia	2.20	3.01	2.85	4.22	2.97	4.21	-2.36	-1.07	1.18	2.01
WEST AFRICA	2.79	2.39	-0.12	-11.48	3.74	5.47	11.88	4.36	6.42	-4.53
Benin	1.75	5.10	2.75	4.49	2.45	4.01	1.05	3.95	-2.40	1.46
Burkina Faso	2.00	0.50	9.90	2.59	2.12	0.50	6.04	0.20	-1.68	4.78
Cape Verde	7.08	5.57	8.30	4.62	5.72	9.15	9.83	4.75	0.21	4.00
Cote d'Ivoire	-2.46	-6.00	2.38	-2.97	-1.07	-3.88	-3.62	-4.90	-4.43	4.83
Gambia	6.43	4.00	-3.54	2.63	11.72	2.63	4.32	2.64	7.59	5.91
Ghana	5.30	5.00	4.81	5.45	2.82	5.45	14.40	5.46	15.95	-9.80
Guinea	4.15	3.36	2.65	1.03	3.20	2.35	7.05	5.97	5.15	3.08
Guinea Bissau	5.23	6.00	4.20	7.04	2.50	3.40	3.04	8.23	6.13	6.25
Liberia	0.12	-2.00	0.94	-0.25	-0.15	-0.26	-8.00	-0.16	-0.63	-2.48
Mali	6.04	5.00	1.70	5.38	2.81	4.16	5.94	5.11	5.70	5.71
Mauritania	3.18	2.68	0.13	2.67	2.60	1.97	-2.16	1.43	9.04	5.76
Niger	2.55	2.40	2.03	0.84	1.61	2.83	3.97	3.85	0.95	2.30
Nigeria	3.08	3.30	6.38	-37.56	8.54	8.23	55.97	8.45	30.32	-7.76
Senegal	4.62	3.50	2.93	2.40	4.22	3.60	-0.45	5.33	3.52	2.32
Sierra Leone	0.53	-1.00	-1.94	-1.83	0.25	-1.89	5.70	-1.84	-5.22	2.73
Togo	4.57	4.50	2.53	2.16	5.99	4.87	4.64	2.43	-4.10	5.60
CENTRAL AFRICA	-1.18	-0.62	-2.62	-0.97	-0.21	-1.48	-5.25	1.14	-1.81	0.78
Burundi	1.95	2.54	2.35	3.91	2.80	2.01	-5.17	1.36	9.35	7.84
Cameroon	-2.74	-6.00	-2.91	-6.42	-1.92	-7.67	-3.71	-3.90	-5.19	4.90
Central African Republic	1.68	2.00	-2.90	0.57	1.72	1.63	-1.21	5.65	-3.61	1.65
Chad	5.06	4.70	2.91	3.97	4.12	2.69	2.00	3.01	4.72	5.33
Congo	0.74	2.90	0.38	2.71	0.19	5.35	-5.11	-1.00	2.40	6.58
Equatorial Guinea	4.29	3.99	3.99	3.87	3.65	2.93	3.04	3.11	6.53	3.09
Gabon	-7.93	2.50	-10.95	-6.12	-2.13	5.24	-11.85	17.16	-13.03	-7.22
Rwanda	1.18	2.85	5.52	6.50	1.05	2.50	0.09	2.97	0.36	4.03
Sao Tome and Principe	2.10	5.91	1.20	6.38	0.25	3.95	-0.24	5.82	3.28	6.95
Zaire	2.26	2.05	0.49	3.49	1.13	1.50	0.76	0.40	4.64	3.28
EAST AND SOUTHERN AFRICA	3.77	3.60	5.30	7.97	6.11	8.41	1.10	3.41	6.67	13.88
Angola	3.00	0.90	1.42	2.93	1.23	0.87	-0.93	4.69	3.21	1.16
Botswana	8.09	5.70	9.73	13.79	4.45	2.60	0.94	2.40	15.95	8.32
Comoros	3.07	3.00	2.47	2.00	3.17	2.91	-2.81	3.86	5.82	3.53
Djibouti	2.24	1.04	2.09	0.60	6.57	4.18	1.23	0.79	-1.97	0.84
Ethiopia	3.59	-0.06	12.51	1.24	2.11	1.07	0.22	8.26	3.66	9.00
Kenya	5.18	5.00	3.34	16.57	9.24	2.06	1.27	5.25	3.12	24.60
Lesotho	5.90	3.90	3.43	2.69	1.93	1.22	5.85	14.96	20.21	14.70
Madagascar	2.08	4.00	1.15	3.84	1.29	2.59	2.89	5.98	4.38	6.15
Malawi	2.46	3.90	-7.54	-2.21	4.97	9.52	3.91	1.48	21.78	2.77
Mauritius	6.85	4.20	3.90	2.99	9.97	4.40	16.49	-13.14	14.70	4.31
Mozambique	4.73	5.10	4.93	5.10	7.16	5.10	-2.95	5.10	7.25	5.10
Seychelles	4.58	6.90	1.84	-7.46	4.82	-7.45	-1.86	7.44	6.56	3.77
Somalia	2.88	2.90	9.02	4.19	-1.21	-2.73	15.93	22.42	3.41	8.07
Swaziland	5.98	4.70	-1.67	-5.31	-2.76	-5.30	-11.77	-5.23	11.10	17.15
Tanzania, United Rep. of	3.70	3.80	2.85	6.61	5.24	7.57	7.64	2.72	6.15	-3.20
Uganda	5.14	6.63	34.00	59.23	33.25	59.24	28.49	58.81	-8.98	-5.43
Zambia	1.45	0.10	-7.03	-1.05	4.40	-1.07	-4.12	1.06	28.61	72.38
Zimbabwe	2.65	5.51	9.51	3.30	-0.52	3.30	-6.84	3.16	12.55	13.85
TOTAL AFRICA	2.39	2.46	1.02	-0.25	3.27	4.14	0.99	3.21	1.92	3.80

Table 14. Resources and their uses at current market prices, 1985 and 1989

(Hundred millions of dollars)

Subregion, country	RESOURCES						USES							
	GDP		Imports of goods and non factor services		Total		Public consumption		Private consumption		Gross capital formation		Exports of goods and nonfactor services	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	1307	1463	343	328	1650	1792	255	273	703	839	374	360	318	318
Algeria	572	582	118	84	690	666	90	105	268	274	194	178	138	110
Egypt	229	290	67	57	296	347	38	38	164	228	50	50	44	31
Libyan Arab Jamahiriya	252	244	77	81	329	325	85	76	97	95	67	61	81	93
Morocco	129	175	42	45	171	220	20	25	89	123	35	37	26	35
Sudan	47	72	8	14	55	86	8	13	35	55	8	12	4	6
Tunisia	78	100	30	47	109	148	13	17	49	65	21	23	26	43
WEST AFRICA	872	644	138	160	1010	805	90	60	673	502	77	93	170	149
Benin	11	18	5	7	17	24	1	2	10	16	2	4	3	3
Burkina Faso	14	23	5	10	18	33	2	4	12	20	4	7	2	2
Cape Verde	1	1	1	1	2	2	-	-	1	1	1	1	-	-
Cote d'Ivoire	70	63	23	17	93	80	10	10	42	42	9	7	32	20
Gambia	1	2	1	1	2	3	-	-	1	1	-	-	1	2
Ghana	45	52	7	14	52	66	4	6	39	43	4	8	5	9
Guinea	27	25	9	8	36	33	3	2	20	18	4	5	8	8
Guinea-Bissau	9	4	5	2	13	5	2	1	9	3	2	1	1	1
Liberia	11	12	3	3	14	15	1	2	6	8	1	1	5	4
Mali	11	24	5	8	15	12	1	3	10	20	2	6	2	4
Mauritania	6	10	5	6	11	16	2	2	5	7	2	2	3	6
Niger	14	21	5	7	19	29	1	2	11	17	2	4	4	6
Nigeria	612	334	47	59	659	393	56	19	475	263	37	40	92	71
Senegal	24	34	11	10	35	44	4	5	18	25	4	5	8	8
Sierra Leone	10	8	1	1	11	8	1	-	8	6	1	1	1	1
Togo	8	14	4	6	12	20	1	2	5	10	2	3	4	5
CENTRAL AFRICA	238	280	84	83	322	363	30	41	138	177	63	63	91	82
Burundi	12	12	2	3	14	14	2	2	9	9	2	2	1	1
Cameroon	85	116	16	21	102	138	8	12	55	77	21	31	18	18
Central African Republic	7	12	2	3	9	15	1	1	6	10	1	2	1	2
Chad	7	10	3	4	11	14	1	2	8	9	1	1	1	2
Congo	22	23	10	9	31	32	4	5	9	13	7	4	12	11
Equatorial Guinea	1	1	-	1	1	1	-	-	-	1	-	-	-	-
Gabon	37	35	16	11	52	46	7	7	11	15	14	9	21	15
Rwanda	17	17	3	3	20	21	2	2	14	14	3	3	2	2
Sao Tome and Principe	-	-	-	-	1	1	-	-	-	-	-	-	-	-
Zaire	50	52	31	29	81	81	6	9	26	29	15	12	34	31
EAST AND SOUTHERN AFRICA	435	507	117	146	552	653	82	103	298	347	73	83	98	122
Angola	54	66	17	18	71	84	14	19	31	41	5	6	20	19
Botswana	9	18	5	9	15	27	2	5	4	7	3	4	5	12
Comoros	1	2	1	1	2	3	-	1	1	2	-	-	-	-
Djibouti	3	4	3	3	6	7	1	1	2	3	1	1	2	2
Ethiopia	48	60	11	14	59	73	9	15	37	43	7	9	5	7
Kenya	68	83	18	24	87	107	12	16	40	51	18	21	17	19
Lesotho	2	4	3	5	6	9	1	1	4	5	1	2	-	1
Madagascar	23	27	5	4	28	31	3	4	18	20	3	4	3	4
Malawi	11	16	3	5	15	21	2	2	8	13	2	2	3	3
Mauritius	11	20	6	15	17	35	1	2	7	13	3	5	6	14
Mozambique	26	14	5	6	31	19	5	3	22	14	2	1	1	1
Seychelles	2	3	1	2	3	5	1	1	1	2	-	1	1	1
Somalia	11	12	2	1	13	13	1	1	10	9	2	3	-	-
Swaziland	3	6	3	4	7	10	1	1	3	4	1	1	2	4
Tanzania, United Rep. of	52	29	8	10	59	39	8	3	40	27	8	5	3	3
Uganda	39	52	4	-	43	52	4	6	29	41	4	5	5	-
Zambia	26	32	10	9	37	41	6	4	16	24	4	2	10	11
Zimbabwe	44	59	13	18	57	77	10	18	24	29	9	10	13	20
TOTAL AFRICAL	2852	2895	681	717	3533	3612	457	477	1811	1864	588	599	677	672

Table 15. Resources and their uses at constant 1980 market prices, 1985 and 1989

(Hundred millions of dollars)

Subregion, country	R E S O U R C E S						U S E S							
	GDP		Imports of goods and non factor services		Total		Public consumption		Private consumption		Gross capital formation		Exports of goods and nonfactor services	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	1551	1703	417	411	1968	2115	304	312	774	884	435	433	455	485
Algeria	522	526	105	117	627	643	68	65	220	224	185	188	154	165
Egypt	337	411	83	87	420	498	77	94	184	258	76	62	82	86
Libyan Arab Jamahiriya	292	293	124	95	415	387	96	79	115	103	69	67	135	139
Morocco	213	256	52	61	265	316	38	46	136	160	55	65	36	46
Sudan	80	100	12	11	91	111	8	10	51	63	22	26	11	12
Tunisia	107	117	42	42	150	159	17	19	68	77	28	25	36	38
WEST AFRICA	934	1043	172	157	1106	1200	104	102	719	790	74	110	210	197
Benin	13	14	7	7	20	21	1	1	13	14	3	3	3	3
Burkina Faso	20	21	6	7	25	28	2	4	17	18	4	5	2	2
Cape Verde	2	3	1	2	3	4	-	1	2	2	1	1	-	-
Cote d'Ivoire	127	115	42	40	169	155	18	19	76	73	16	14	59	49
Gambia	3	3	1	2	4	5	1	1	2	3	1	1	-	-
Ghana	147	180	17	20	164	200	26	32	111	124	15	25	12	20
Guinea	18	21	6	7	24	28	3	3	14	16	2	3	5	6
Guinea Bissau	4	5	3	3	7	8	1	1	5	6	1	1	1	1
Liberia	9	9	3	3	12	11	1	1	5	5	1	1	4	4
Mali	17	21	7	6	23	27	2	2	14	16	4	5	3	4
Mauritania	7	8	5	6	12	14	2	2	5	6	2	2	4	5
Niger	21	23	7	7	28	30	2	2	17	18	3	4	6	7
Nigeria	491	555	43	24	535	579	36	25	396	442	13	38	90	75
Senegal	33	40	16	16	49	56	5	6	24	28	5	5	15	17
Sierra Leone	12	12	2	1	14	14	1	1	10	10	1	2	2	1
Togo	11	13	6	6	17	19	2	2	8	10	3	3	5	4
CENTRAL AFRICA	285	272	75	63	360	335	38	34	165	163	65	52	91	85
Burundi	12	12	3	3	14	16	2	2	9	10	2	1	1	2
Cameroon	106	94	14	12	120	106	10	9	66	61	26	22	17	14
Central African Republic	10	10	4	3	13	13	2	2	8	8	1	1	3	2
Chad	8	10	2	2	10	12	2	2	7	8	1	1	2	2
Congo	23	24	9	8	32	32	4	4	10	10	5	4	13	14
Equatorial Guinea	-	1	-	-	1	1	-	-	-	-	-	-	-	-
Gabon	43	31	21	10	65	41	9	6	15	13	17	9	23	13
Rwanda	16	16	3	3	19	20	2	2	13	13	3	3	1	1
Sao Tome and Principe	-	-	-	-	1	1	-	-	-	-	-	-	-	-
Zaire	67	73	19	20	85	94	7	7	38	39	10	11	31	37
EAST AND SOUTHERN AFRICA	444	515	155	227	599	741	81	100	284	359	81	84	154	198
Angola	40	45	10	8	50	54	9	9	20	21	3	3	18	21
Botswana	16	21	8	10	24	31	4	5	6	6	4	4	10	17
Comoros	2	2	1	1	2	3	-	1	1	1	-	-	-	-
Djibouti	2	3	2	3	5	5	1	1	2	2	1	1	1	1
Ethiopia	43	49	7	8	50	57	6	9	28	30	8	8	8	9
Kenya	71	87	15	20	87	107	12	14	41	58	17	18	16	18
Lesotho	4	5	5	5	9	10	1	1	6	6	2	2	1	1
Madagascar	32	34	5	5	37	39	6	6	23	24	5	5	3	4
Malawi	14	15	4	8	18	23	2	2	10	12	3	3	3	7
Mauritius	14	18	8	15	22	34	2	2	10	14	3	5	8	11
Mozambique	11	14	4	6	15	19	3	3	11	14	1	1	1	2
Seychelles	2	2	1	1	3	3	-	-	1	1	-	-	1	2
Somalia	11	12	1	1	12	13	1	1	9	9	1	3	-	-
Swaziland	6	8	7	6	13	14	1	1	5	4	2	1	5	7
Tanzania, United Rep. of	38	44	16	23	54	66	6	7	34	42	8	11	6	7
Uganda	31	37	31	56	62	94	3	8	18	53	3	7	39	26
Zambia	42	44	11	27	53	71	8	6	23	26	8	6	13	34
Zimbabwe	67	74	18	23	85	97	17	24	38	36	12	8	19	29
TOTAL AFRICA	3215	3533	819	858	4034	4391	527	548	1941	2197	655	680	910	965

Table 16. Area distribution of land use 1985 and 1989

(Thousands of hectares)

Sub-region/ Country	Year	Arable land	Land under permanent crops	Permanent meadows & pastures	Forest and woodland	Other land
NORTH AFRICA	1985	34400	3317	166740	59860	547122
	1989	35330	3461	166312	59115	547221
Algeria	1985	6910	601	31540	4384 F	194739
	1989	7070 F	535 F	31175 F	4699 F	194695
Egypt	1985	2305	192	0	31 F	97017
	1989	2310 F	275	0	31 F	96929
Morocco	1985	7878	526	20900 F	7865 F	7461
	1989	8661	580 F	20900 F	7930 F	6559
Libyan Arab Jamahiriya	1985	1787	340	13300	650	159877
	1989	1805 F	345 F	13300 F	685 F	159819
Sudan	1985	12420 F	58 F	98000 F	46340 F	80782
	1989	12450 F	60 F	98000 F	45140 F	81950
Tunisia	1985	3100 F	1600 F	3000 F	590 F	7246
	1989	3034	1666	2937	630	7269
CENTRAL AFRICA	1985	20669	2559	87522	293218	124885
	1989	20845	2600	87490	291008	127425
Burundi	1985	1120 F	205 F	910 F	64 F	266
	1989	1120 F	216 F	914 F	66 F	249
Cameroon	1985	5910 F	1055 F	8300 F	25090 F	6185
	1989	5940 F	1068 F	8300 F	24650 F	6582
Central African Republic	1985	1900 F	83 F	3000 F	35850 F	21465
	1989	1920 F	86 F	3000 F	35810 F	21482
Chad	1985	3150 F	5 F	45000 F	13130 F	64635
	1989	3200 F	5 F	45000 F	12810 F	64905
Congo	1985	140 F	22 F	10000 F	21260 F	2213
	1989	144 F	24 F	10000 F	21180 F	2802
Equatorial Guinea	1985	130 F	100 F	104 F	1295 F	1176
	1989	130 F	100 F	104 F	1295 F	1176
Gabon	1985	290 F	162 F	4700 F	20000 F	615
	1989	290 F	162 F	4700 F	20000 F	615
Rwanda	1985	827 F	292 F	507 F	569 F	272
	1989	849 F	304 F	471 F	557 F	286
Sao Tome and Principe	1985	2 F	35 F	1 F	0	58
	1989	2 F	35 F	1 F	0	58
Zaire	1985	7200 F	600 F	15000 F	175960 F	28000
	1989	7250 F	600 F	15000 F	174640 F	29270

Table 16. Area distribution of land use 1985 and 1989 (continued)

(Thousands of hectares)

Sub-region/ Country	Year	Arable land	Land under permanent crops	Permanent meadows & pastures	Forest and woodland	Other land
WEST AFRICA	1985	51906	6384	169631	83409	294949
	1989	52715	6445	169701	79385	297573
Benin	1985	1390 F	448 F	442 F	3720 F	5062
	1989	1410 F	450 F	442 F	3520 F	5240
Burkina Faso	1985	3022 F	13 F	10000 F	6900 F	7445
	1989	3551 F	13 F	10000 F	6660 F	7156
Cape Verde	1985	38 F	2	25 F	1 F	337
	1989	37 F	2 F	25 F	1 F	338
Côte d'Ivoire	1985	2380 F	1200 F	13000 F	8630 F	6590
	1989	2420 F	1240 F	13000 F	7630 F	7510
Gambia	1985	165 F	0	90 F	186 F	559
	1989	178 F	0	90 F	162 F	570
Ghana	1985	1120 F	1570 F	5000 F	8420 F	6892
	1989	1140 F	1580 F	5000	8140 F	7142
Guinea	1985	610 F	115 F	6150 F	14860 F	2831
	1989	610 F	118 F	6150 F	14640	3068
Guinea-Bissau	1985	290 F	30 F	1080 F	1070 F	342
	1989	300 F	35 F	1080 F	1070 F	327
Liberia	1985	126 F	245 F	5700 F	1840 F	1721
	1989	128 F	245 F	5700 F	1760 F	1799
Mali	1985	2070 F	3 F	30000 F	7100 F	82846
	1989	2090 F	3 F	30000 F	6980 F	82946
Mauritania	1985	192 F	3 F	39250 F	4980 F	58097
	1989	196 F	3 F	39250 F	4940 F	58133
Niger	1985	3740	0	9200 F	2300 F	111590
	1989	3605	0	9270 F	2060 F	111735
Nigeria	1985	28550 F	2535 F	40000 F	13400 F	6592
	1989	28800 F	2535 F	40000 F	12200 F	7542
Senegal	1985	5220 F	5 F	5700 F	5942	2386
	1989	5220 F	6 F	5700 F	5942	2385
Sierra Leone	1985	1635 F	146 F	2204 F	2090 F	1087
	1989	1655 F	146 F	2204 F	2070 F	1087
Togo	1985	1358 F	69 F	1790 F	1650 F	572
	1989	1375 F	69 F	1790 F	1610 F	595

Table 16. Area distribution of land use 1985 and 1989 (continued)

(Thousands of hectares)

Sub region/ Country	Year	Arable land	Land under permanent crops	Permanent meadows & pastures	Forest and woodland	Other land
EAST AND SOUTHERN AFRICA	1985	46312	5443	381058	253378	182328
	1989	46861	5498	380948	249461	185756
Angola	1985	2950 F	550 F	29000 F	53310 F	38860
	1989	3050 F	550 F	29000 F	52950 F	39120
Botswana	1985	1360 F	0	33000 F	10960 F	11353
	1989	1380 F	0	33000 F	10920 F	11373
Comoros	1985	76 F	21 F	15 F	35 F	76
	1989	78 F	22 F	15 F	35 F	73
Djibouti	1985	0	0	200 F	6 F	2112
	1989	0	0	200 F	6 F	2112
Ethiopia	1985	13200 F	730 F	45150 F	27600 F	23420
	1989	13200 F	730 F	44950 F	27200 F	24020
Kenya	1985	1880 F	490 F	38100 F	2440 F	14059
	1989	1930 F	498 F	38100 F	2360 F	14081
Lesotho	1985	300 F	0	2000 F	0	735
	1989	320 F	0	2000 F	0	715
Madagascar	1985	2530 F	510 F	34000 F	16280 F	4834
	1989	2570 F	522 F	34000 F	15680 F	5382
Malawi	1985	2350 F	26 F	1840 F	4180 F	1012
	1989	2380 F	29 F	1840 F	3740 F	1419
Mauritius	1985	100	7	7	58	13
	1989	100 F	6 F	7 F	57 F	15
Mozambique	1985	2860 F	230 F	44000 F	14860 F	16459
	1989	2870 F	230 F	44000 F	14380 F	16929
Namibia	1985	660 F	2 F	38000 F	18350 F	25317
	1989	640 F	2 F	38000 F	18150 F	25517
Seychelles	1985	1 F	5 F	0	5 F	16
	1989	1 F	5 F	0	5 F	16
Somalia	1985	1009 F	16 F	43000 F	9110 F	9599
	1989	1022 F	17 F	43000 F	9070 F	9625
Swaziland	1985	176 F	4 F	1090 F	104 F	346
	1989	160 F	4 F	1180 F	108 F	268
Tanzania, United Republic of	1985	4130 F	1060 F	35000 F	41540 F	6874
	1989	4160 F	1080 F	35000 F	41060 F	7304
Uganda	1985	4900 F	1700 F	1800 F	5810 F	5745
	1989	5000 F	1705 F	1800 F	5610 F	5840
Zambia	1985	5180 F	8 F	30000 F	29200 F	9951
	1989	5260 F	8 F	30000 F	28920 F	10151
Zimbabwe	1985	2650 F	84 F	4856 F	19530 F	11547
	1989	2720 F	90 F	4856 F	19210 F	11791
TOTAL AFRICA	1985	153287	7703	804951	689865	1149284
	1989	155751	18004	804451	678969	1157975

Source: FAO, Production (printout); Symbols: ECA estimate; F FAO estimate

Table 17. Agricultural indicators, 1985-1989

Subregion, country	Arable land (ha per capita)	Value added in agriculture (million of 1980 US\$)	Average index of food production per capita (1979-81=100)		Production of cereals (kg per capita)	Cereal imports (kg per capita)
			1985	1989		
	1989	1985	1989	1985-1989	1989	1989
NORTH AFRICA	0.249	14554	17195	101.23	161	131
Algeria	0.281	2727	2420	101.32	65	103
Egypt	0.044	4320	5206	114.23	196	161
Libyan Arab Jamahiriya	0.420	878	1108	108.28	76	62
Morocco	0.323	3416	3636	120.02	304	54
Sudan	0.511	1712	2886	83.50	81	23
Tunisia	0.404	1501	1940	101.75	80	207
WEST AFRICA	0.278	31693	36718	108.10	124	39
Benin	0.310	442	498	114.43	131	23
Burkina Faso	0.390	822	786	115.59	223	14
Cape Verde	0.098	40	50	116.65	19	108
Cote d'Ivoire	0.203	2514	2658	95.61	98	57
Gambia	0.199	68	120	93.15	145	97
Ghana	0.082	6992	7460	108.05	86	17
Guinea	0.221	1976	2136	91.88	125	27
Guinea Bissau	0.324	129	168	110.27	254	61
Liberia	0.050	240	269	95.57	113	64
Mali	0.230	785	1045	97.76	238	19
Mauritania	0.098	160	195	89.22	94	106
Niger	0.485	866	1036	84.88	268	16
Nigeria	0.262	15335	18872	97.54	103	2
Senegal	0.710	593	723	110.33	149	72
Sierra Leone	0.430	433	386	90.62	120	36
Togo	0.402	298	316	93.16	170	33
CENTRAL AFRICA	0.285	6513	6061	92.30	51	24
Burundi	0.210	605	602	100.21	50	1
Cameroon	0.520	2301	1723	97.04	82	30
Central African Republic	0.652	381	430	96.38	53	10
Chad	0.578	352	390	99.66	172	7
Congo	0.293	245	239	98.28	6	43
Equatorial Guinea	0.285	16	18	0.00		44
Gabon	0.201	262	197	81.88	12	45
Rwanda	0.120	474	490	80.50	40	2
Sao Tome and Principe	0.017	7	7	71.08	8	93
Zaire	0.177	1869	1965	95.81	36	9
EAST AND SOUTHERN AFRICA	0.246	13060	14874	96.20	134	23
Angola	0.312	1464	1536	86.01	29	26
Botswana	1.095	56	69	73.34	49	59
Comoros	0.164	66	74	92.96	42	95
Djibouti	0.015	7	8	0.00		86
Ethiopia	0.270	1534	1961	90.03	132	15
Kenya	0.080	1913	2333	80.74	143	5
Lesotho	0.196	66	87	80.91	72	81
Madagascar	0.238	1223	1338	94.07	219	10
Malawi	0.297	468	492	87.04	195	11
Mauritius	0.092	176	174	102.79	2	205
Mozambique	0.190	481	562	84.81	36	26
Seychelles	0.015	12	13	0.00		200
Somalia	0.142	579	612	98.29	83	25
Swaziland	0.190	140	155	96.97	185	52
Tanzania, United Rep. of	0.161	1703	1990	90.72	176	3
Uganda	0.286	1556	1833	88.14	57	1
Zambia	0.690	647	687	96.97	244	15
Zimbabwe	0.290	970	951	97.81	261	6
TOTAL AFRICA	0.263	65819	76848	94.82	127	51

**Table 18. Annual production and net imports of selected food items, 1979-1981
average, 1985 and 1989**

(Thousands of tons)

Subregion, country	Production						Net imports		
	Cereals			Roots and tubers			Cereals		
	1979-81	1985	1989	1979-81	1985	1989	1979-81	1985	1989
NORTH AFRICA	18216	22922	23382	2893	3553	3419	12794	19356	20723
Algeria	2055	2919	1608	540	815	1030	3036	5266	7461
Egypt	8131	8587	11113	1330	1704	1838	6114	8879	8503
Libyan Arab Jamahiriya	225	235	302	97	110	116	708	1114	1515
Morocco	3586	5332	7370	503	540	800	2049	2172	1323
Sudan	3073	4069	3354	296	234	156	3	1148	266
Tunisia	1146	2104	652	127	150	179	884	732	1655
WEST AFRICA	16514	22212	23027	40478	48353	48511	3955	4226	3060
Benin	367	526	598	1363	1526	2077	64	53	104
Burkina Faso	1166	1577	1952	88	95	112	68	201	118
Cape Verde	4	1	10	15	10	15	56	67	39
Cote d'Ivoire	856	1089	1193	3429	4671	3962	465	493	691
Gambia	82	117	97	6	6	6	45	73	81
Ghana	726	909	1176	3045	4626	5172	191	137	244
Guinea	559	739	740	644	663	624	137	140	183
Guinea Bissau	95	180	246	42	40	40	35	33	59
Liberia	251	289	297	346	335	454	102	104	158
Mali	1064	1675	2157	118	140	136	77	315	89
Mauritania	57	59	149	7	5	6	146	266	207
Niger	1702	1849	1849	212	239	246	61	259	105
Nigeria	7976	11916	11270	30072	34952	34602	1893	1957	240
Senegal	767	1242	1086	43	49	77	472	70	515
Sierra Leone	541	486	449	126	145	152	96	119	145
Togo	301	372	479	922	851	830	47	51	82
CENTRAL AFRICA	3089	3570	3591	20783	23780	24953	702	809	985
Burundi	395	256	265	1033	1218	1291	17	20	4
Cameroon	866	710	862	2030	2170	2424	132	139	337
Central African Republic	102	110	149	1164	979	778	14	20	28
Chad	539	692	620	424	563	643	22	86	37
Congo	13	16	22	674	661	826	68	100	82
Equatorial Guinea	-	-	-	86	90	93	4	10	15
Gabon	11	14	21	372	382	424	11	64	50
Rwanda	271	340	284	1743	1520	1400	13	31	98
Sao Tome and Principe	1	1	1	14	16	17	9	8	11
Zaire	891	1109	1180	13243	16181	17057	412	331	323
EAST AND SOUTHERN AFRICA	20824	22962	25185	22996	26165	24332	2453	3640	2129
Angola	379	325	289	2070	2170	2130	318	284	248
Botswana	35	18	24	7	7	8	65	145	73
Comoros	19	19	19	101	110	60	22	19	43
Djibouti	-	-	-	-	-	-	27	64	46
Ethiopia	5796	4820	6013	1414	1275	1684	285	717	690
Kenya	2281	2877	3462	3090	1480	1470	143	245	181
Lesotho	198	167	124	6	6	7	101	119	140
Madagascar	2178	2319	2512	2267	2949	3128	207	194	83
Malawi	1452	1423	1588	556	483	485	32	88	80
Mauritius	1	5	4	12	24	20	169	179	208
Mozambique	642	585	540	3212	3362	3525	343	365	400
Seychelles	-	-	-	-	-	-	8	7	14
Somalia	300	510	562	39	39	49	262	300	186
Swaziland	92	91	141	13	8	11	31	32	40
Tanzania, United Rep. of	3001	3749	4633	6365	6027	6890	202	402	60
Uganda	1171	1163	975	3563	7880	4450	34	20	16
Zambia	1020	1193	1974	205	235	288	325	200	123
Zimbabwe	2259	3552	2460	76	110	119	121	36	140
TOTAL AFRICA	58643	72498	79161	87150	100942	118299	19904	28141	26897

Table 19. Livestock and fisheries indicators, 1985 and 1989

Subregion, country	Cattle (thousand head)		Sheep (thousand head)		Goat (thousand head)		Chickens (million head)		Fish catch (thousand tons)	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	28823	30192	60986	59740	25653	27040	153	164	878	1063
Algeria	1416	1410	15000	13270	3010	3600	22	24	66	108
Egypt	1709	1950	1149	1170	1563	1650	29	30	216	250
Libyan Arab Jamahiriya	200	218	5500	5800	900	970	25	26	10	9
Morocco	2501	3400	12862	15900	4562	5900	33	37	473	567
Sudan	22180	22600	20629	19000	14364	14000	28	30	26	24
Tunisia	620	614	5220	5100	1080	1120	16	17	89	104
WEST AFRICA	32152	33805	37315	40462	52642	56029	292	352	1229	1349
Benin	912	932	1122	890	1071	994	21	23	39	41
Burkina Faso	3045	2850	2148	3050	3236	5350	19	22	7	7
Cape Verde	13	12	2	3	75	80	-	-	10	7
Cote d'Ivoire	843	991	1450	1500	1450	1500	16	16	111	104
Gambia	290	300	185	200	194	200	-	-	11	15
Ghana	1112	1350	2000	2200	1600	2000	9	11	276	372
Guinea	1800	1800	460	460	460	460	11	13	30	34
Guinea-Bissau	325	340	195	205	200	210	1	1	5	4
Liberia	42	42	238	240	235	235	4	4	11	18
Mali	4344	4880	5000	5650	4847	5650	14	15	60	56
Mauritania	1050	1260	1900	4200	3100	3300	4	4	103	98
Niger	3400	3600	4530	3500	7400	7570	14	13	2	3
Nigeria	11872	12200	12850	11200	26000	26000	160	205	244	263
Senegal	2200	2673	3100	3886	1080	1200	12	12	245	259
Sierra Leone	330	330	320	330	170	180	5	6	54	54
Togo	228	240	716	1050	851	1200	2	3	16	16
CENTRAL AFRICA	13727	10160	6623	7223	10892	11986	42	57	427	452
Burundi	415	345	369	370	798	770	4	4	5	7
Cameroon	4151	4852	2248	3170	2319	3213	11	11	86	84
Central African Republic	2073	2382	108	130	1057	1200	2	3	13	13
Chad	4000	4115	2250	2310	2250	2310	3	4	115	111
Congo	67	71	62	65	183	187	1	1	30	42
Equatorial Guinea	4	5	35	35	7	8	-	-	4	4
Gabon	8	10	80	84	60	64	2	2	21	21
Rwanda	650	630	357	367	1018	1100	1	1	1	1
Sao Tome and Principe	3	4	2	4	4	4	11	11	4	3
Zaire	1300	1450	800	890	2800	3050	18	20	148	166
EAST AND SOUTHERN AFRICA	87955	94472	50535	54606	58865	65116	209	225	933	1173
Angola	3360	3410	250	270	960	980	6	6	74	103
Botswana	2802	2510	165	190	827	1395	1	1	2	2
Comoros	84	86	9	10	94	96	-	-	5	6
Djibouti	55	72	410	415	500	500	-	-	-	-
Ethiopia	28000	28900	23500	24000	17260	18000	56	58	4	4
Kenya	11500	13457	7000	6325	7500	7500	20	24	106	141
Lesotho	525	530	1392	1450	978	1040	1	1	-	-
Madagascar	10194	10250	478	800	941	1200	17	21	64	82
Malawi	1020	1100	192	220	939	1000	8	9	62	89
Mauritius	30	30	7	7	83	95	2	2	12	18
Mozambique	1330	1370	115	120	360	380	20	22	36	35
Seychelles	2	2	-	-	4	4	-	-	4	5
Somalia	5000	5000	12500	13800	19000	20300	3	3	17	18
Swaziland	648	660	30	37	268	325	1	1	-	-
Tanzania, United Rep. of	12600	14000	3487	5000	7255	6650	14	30	301	343
Uganda	5000	5912	1674	1780	3246	2900	17	21	161	242
Zambia	2690	2770	75	82	395	450	13	15	68	68
Zimbabwe	5172	6453	549	610	1533	2500	9	11	17	18
TOTAL AFRICA	162647	168629	134375	162041	149038	160171	672	798	3467	4037

Table 20. Production of roundwood, 1985 and 1989

(Thousands of cubic metres)				
	Year	Total roundwood	Fuelwood and charcoal	Industrial roundwood
NORTH AFRICA	1985	20338	26052	3286
	1989	32527	29062	3465
Algeria	1985	1883	1653	230
	1989	2131	1874	257
Egypt	1985	2040	1945	95
	1989	2266	2161	105
Libyan Arab Jamahiriya	1985	636	536	100
	1989	642	536	106
Morocco	1985	2164	1280	884
	1989	2111	1364	747
Sudan	1985	19763	17901	1862
	1989	22199	20112	2087
Tunisia	1985	2852	2737	115
	1989	3178	3015	163
CENTRAL AFRICA	1985	66147	57191	8956
	1989	73130	63471	9659
Burundi	1985	3634	3590	44
	1989	4083	4034	49
Cameroon	1985	11887	9129	2758
	1989	12850	10142	2708
Central African Republic	1985	3417	2925	492
	1989	3455	3055	400
Chad	1985	3566	3062	504
	1989	3936	3380	556
Congo	1985	2180	1584	596
	1989	3100	1776	1324
Equatorial Guinea	1985	607	447	160
	1989	607	447	160
Gabon	1985	3540	2158	1382
	1989	3700	2478	1222
Rwanda	1985	5842	5602	240
	1989	5842	5602	240
Sao Tome and Principe	1985	8	0	8
	1989	9	0	9
Zaire	1985	31268	28694	2574
	1989	35348	32557	2791

Table 20. Production of roundwood, 1985 and 1989 (continued)

(Thousands of cubic metres)

	Year	Total roundwood	Fuelwood and charcoal	Industrial roundwood
WEST AFRICA	1985	158915	142966	15949
	1989	178153	161865	16288
Benin	1985	4399	4177	222
	1989	5000	4738	262
Botswana	1985	7665	7319	347
	1989	8526	8141	385
Cape Verde	1985	—	—	—
	1989	—	—	—
Côte d'Ivoire	1985	12294	8333	3961
	1989	13243	9830	3413
Gambia	1985	886	865	21
	1989	922	901	21
Ghana	1985	16540	15459	1081
	1989	17169	16068	1101
Guinea	1985	4239	3645	604
	1989	4669	4022	647
Guinea-Bissau	1985	559	422	137
	1989	567	422	145
Liberia	1985	4442	3898	544
	1989	5960	4800	1160
Mali	1985	4903	4596	307
	1989	5516	5163	353
Mauritania	1985	10	6	4
	1989	12	7	5
Niger	1985	3920	3678	242
	1989	4418	4146	272
Nigeria	1985	95456	87583	7868
	1989	108298	100430	7868
Senegal	1985	4002	3456	546
	1989	4391	3786	605
Sierra Leone	1985	2745	2602	143
	1989	3014	2874	140
Togo	1985	765	602	163
	1989	866	683	183

Table 20. Production of roundwood, 1985 and 1989 (continued)

(Thousands of cubic metres)

	Year	Total roundwood	Fuelwood and charcoal	Industrial roundwood
EAST AND SOUTHERN AFRICA*	1985	169555	156494	13061
	1989	190859	176142	14717
Angola	1985	4890	1900	990
	1989	5402	4335	1067
Botswana	1985	1149	1078	71
	1989	1321	1239	82
Comoros	1985			
	1989			
Djibouti	1985			
	1989			
Ethiopia	1985	36804	35019	1785
	1989	39640	37884	1756
Kenya	1985	30200	28641	1559
	1989	35650	33884	1766
Lesotho	1985	532	532	
	1989	596	596	
Madagascar	1985	7014	6207	807
	1989	7856	7049	807
Malawi	1985	6688	6378	310
	1989	7593	7205	388
Mauritius	1985	17	12	5
	1989	31	17	14
Mozambique	1985	15216	14270	946
	1989	16027	15022	1005
Namibia	1985	...	...	...
	1989	...	...	...
Seychelles	1985			
	1989			
Somalia	1985	6089	6007	82
	1989	6986	6896	90
Swaziland	1985	2223	560	1663
	1989	2223	560	1663
Tanzania, United Republic of	1985	28244	26858	1386
	1989	33103	31114	1989
Uganda	1985	12499	10866	1633
	1989	14365	12507	1858
Zambia	1985	10820	10285	535
	1989	12204	11565	639
Zimbabwe	1985	7170	5881	1289
	1989	7862	6269	1593
TOTAL AFRICA	1985	423955	382703	41252
	1989	474669	430540	44129

* excluding Namibia

Source: FAO, AGROSTAT/PC database

Table 21. Production, trade and consumption of electricity and selected fuels, 1989

Subregion, country	A. Electricity (million kWh.)				B. Crude Petroleum (thousand metric tons)				
	Production	Imports	Exports	Consumption	Production	Imports	Exports	Change in stocks	Consumption
NORTH AFRICA	85577	145	196	85526	136299	6498	77224	442	65111
Algeria	15324	145	160	15309	34064		11738	226	22100
Egypt	36900			36900	42971		20339	500	22112
Libyan Arab Jamahiriya	18000			18000	54320		41947	600	12973
Morocco	9056			9056	13	5471		233	5251
Sudan	1061			1061		1027		12	1015
Tunisia	5236		36	5200	4931		3200	71	1660
WEST AFRICA	20141	619	380	20380	85660	5385	75870	1116	14059
Benin	5	192		177	295		295		
Burkina Faso				170					
Cape Verde				35					
Cote d'Ivoire	2			2345	190	2221		4	2407
Gambia	6			63					
Ghana	4888		280	4608		1015		29	986
Guinea	517			517					
Guinea-Bissau	15			15					
Liberia	830			830					
Mali	212			212					
Mauritania	123			123		997		12	985
Niger	162	185		147					
Nigeria	9935		100	9835	85175		75575	1000	8600
Senegal	630			630		865		68	797
Sierra Leone	202			202		287		3	283
Togo	49	262		311					
CENTRAL AFRICA	9823	100	114	9809	27402	119	23215	534	4840
Burundi	104	13		117					
Cameroon	2699			2699	8015		6515	565	2065
Central African Republic	92			92					
Chad	52			52					
Congo	397	61		458	7369		6850	2	511
Equatorial Guinea	17			17					
Gabon	876			876	10721		8795	3	1923
Rwanda	175	21	2	194					
Sao Tome and Principe	15			15					
Sierra Leone	5396	5	112	5289	1297	119	1055	26	335
EAST AND SOUTHERN AFRICA	26928	1872	1612	27188	22642	4386	21100	26	5954
Angola	1820			1820	22642		21100		1542
Botswana	1804	65		1869					
Comoros	16			16					
Djibouti	175			175					
Ethiopia	819			819		735		10	728
Kenya	2901	112		3013		2101			2101
Lesotho									
Madagascar	562			562		156		39	195
Malawi	586			586					
Mauritius	641			641					
Mozambique	485	325		810					
Seychelles	85			85					
Somalia	258			258		251		2	249
Swaziland	415			415					
Tanzania, United Rep. of	885			885		553		1	552
Uganda	694		112	582					
Zambia	6742	20	1500	5262		590			590
Zimbabwe	8040	1150		9190					
TOTAL AFRICA	142469	2736	2302	142903	272003	16388	197409	998	89884

Table 21. Production, trade and consumption of electricity and selected fuels, 1989 (Continued)

Subregion, country	C. Motor gasoline					D. Gas diesel oils				
	(thousands of metric tons)									
	Production	Imports	Exports	Change in Stocks	Consumption	Production	Imports	Exports	Bunkers	Change in Stocks
NORTH AFRICA	7813	87	1848		6052	17032	1308	5960	308	68
Algeria	1860		116		1744	7510		4760	100	72
Egypt	3514		1374		2140	3737	810		200	
Libyan Arab Jamahiriya	1700		350		1350	3400		1200		
Morocco	381	2			383	1635	10			6
Sudan	112	85	8		189	315	28		5	
Tunisia	246				246	435	460		3	10
WEST AFRICA	2886	2868	67	12	5675	3091	1195	231	252	7
Benin		62	2	1	59		51			1
Burkina Faso		54			54		75			1
Cape Verde		4			4		19		5	
Cote d'Ivoire	211	147	48	1	307	485	92	145	8	1
Gambia		25			25		29	1		
Ghana	145	89		1	231	230	78		18	1
Guinea		68		1	67		65			2
Guinea Bissau		12		2	10		21			
Liberia		55	1		54		78		5	
Mali		57			57		58			
Mauritania	280	31		1	310	210	28		7	
Niger		43			43		124			
Nigeria	2100	2090	10		4180	1850	300	80	85	
Senegal	115	92	5	1	201	215	97	3	67	1
Sierra Leone	35				35	101	25	2	57	
Togo		39	1		38		55			
CENTRAL AFRICA	570	234	26	3	781	883	458	35	25	3
Burundi		23		3	20		23			
Cameroon	397		1		396	432				
Central African Republic		12		7	19		20			12
Chad		24			24		35			
Congo	55				55	97	2			
Equatorial Guinea		5		1	4		27			1
Gabon	70	5	29		50	259	10	35	25	10
Rwanda		23			23		87			
Sao Tome and Principe		5			5		5			
Zaire	48	137			185	95	250			
EAST AND SOUTHERN AFRICA	876	497	93	4	1276	1546	1853	181	541	10
Angola	105	5	40		70	320	5	5	235	
Botswana										
Comoros		3			3		10			
Djibouti		15			15		80		59	
Ethiopia	98	22		1	119	175	225	28	4	5
Kenya	362	1	30		333	562	48	95	27	
Lesotho										
Madagascar	29	24		1	52	46	108		3	
Malawi		47			47		84			1
Mauritius		54		1	53		162		81	
Mozambique		38			38		230		25	
Seychelles		7		1	6		105		80	4
Somalia	82	12	9		85	82	87	8	27	
Swaziland										
Tanzania, United Rep. of	80	7	2		85	151	112	15		
Uganda		87	2		85		102			
Zambia	120		10		110	210	10	70		
Zimbabwe		175			175		435			
TOTAL AFRICA	12145	3686	2034	13	13784	22552	4765	6402	1126	84

Table 22. Transport and communication indicators, 1985 and 1989

Subregion, country	Length of railway network (km)		Road density (kilometers per square km)		Private motor vehicles per 1,000 inhabitants		Number of telephones per 100 inhabitants	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA								
Algeria	4000	4000	0.030	0.031	28.16	28.68	2.64	2.81
Egypt	5110	5110	0.031	0.031	12.13	17.61	1.16	1.39
Libyan Arab Jamahiriya	0	0	0.045	0.046	110.94	104.77	2.20	2.12
Morocco	1768	1768	0.135	0.139	21.61	19.96	1.29	1.29
Sudan	4756	4756	0.004	0.004	7.84	7.88	0.34	0.30
Tunisia	2475	2475	0.111	0.118	22.86	23.56	3.34	3.50
WEST AFRICA								
Benin	579	579	0.076	0.081	6.17	5.77	0.54	0.58
Burkina Faso	504	504	0.032	0.031	1.75	1.73	0.22	0.20
Cape Verde			0.322	0.322	6.06	5.42	1.22	1.88
Cote d'Ivoire	1171	1171	0.136	0.151	17.21	14.98	1.07	1.18
Gambia			0.275	0.285	5.37	6.00	0.78	0.96
Ghana	925	925	0.148	0.152	3.11	4.30	0.56	0.61
Guinea	940	940	0.118	0.118	1.74	1.71	0.25	0.28
Guinea Bissau			0.117	0.115	4.50	4.14	0.79	0.89
Liberia	493	493	0.038	0.050	7.35	8.08	0.87	0.94
Mali	642	642	0.011	0.011	2.35	2.42	0.16	0.16
Mauritania	650	650	0.007	0.007	6.23	6.35	0.64	0.74
Niger			0.015	0.017	5.70	5.31	0.18	0.21
Nigeria	3523	3523	0.118	0.123	3.68	3.75	0.25	0.28
Senegal	1183	1180	0.072	0.076	9.75	9.06	0.83	0.82
Sierra Leone			0.113	0.117	8.46	8.64	0.69	0.81
Togo	514	514	0.126	0.132	16.47	15.07	1.44	0.48
CENTRAL AFRICA								
Burundi			0.188	0.190	1.88	1.77	0.19	0.22
Cameroon	1186	1186	0.144	0.147	6.82	6.38	0.47	0.51
Central African Republic			0.037	0.039	17.43	16.71	0.46	0.52
Chad			0.021	0.021	2.09	2.00	0.18	0.20
Congo	800	800	0.026	0.028	14.72	14.02	1.17	1.20
Equatorial Guinea			0.143	0.143	2.55	2.33	0.25	0.29
Gabon	330	330	0.029	0.031	16.49	15.56	1.36	1.52
Rwanda			0.456	0.478	1.09	1.03	0.13	0.16
Sao Tome and Principe			0.244	0.250	22.04	26.50	2.69	2.93
Zaire	5088	5088	0.062	0.062	2.99	2.66	0.11	0.10
EAST AND SOUTHERN AFRICA								
Angola	2523	2523	0.058	0.059	15.42	14.87	0.50	0.52
Botswana	714	714	0.014	0.015	10.83	10.15	1.67	1.65
Comoros			0.415	0.420	2.25	1.99	0.69	0.80
Djibouti	100	100	0.148	0.162	18.54	18.27	1.70	2.00
Ethiopia	681	681	0.031	0.037	1.15	1.09	0.27	0.30
Kenya	2652	2652	0.112	0.116	6.31	5.48	1.08	1.10
Lesotho	16	16	0.135	0.147	3.43	3.36	0.72	0.88
Madagascar	1030	1030	0.085	0.086	4.49	4.04	0.52	0.55
Malawi	782	782	0.097	0.108	1.96	1.88	0.56	0.63
Mauritius			0.872	0.884	32.82	36.73	5.06	5.50
Mozambique	1150	1150	0.044	0.044	3.35	2.95	0.38	0.40
Seychelles			0.964	1.044	75.03	79.71	12.50	14.38
Somalia			0.033	0.034	0.86	0.68	0.14	0.15
Swaziland	316	316	0.167	0.192	23.74	22.41	2.47	2.20
Tanzania, United Rep. of	2580	2600	0.087	0.087	2.15	1.94	0.49	0.50
Uganda	1050	1100	0.118	0.120	0.65	0.62	0.37	0.40
Zambia	1924	1924	0.050	0.052	10.42	9.10	1.09	1.05
Zimbabwe	3415	3415	0.200	0.202	29.02	29.94	3.29	3.38
TOTAL AFRICA								
	52644	57637	0.051	0.053	8.81	8.68	0.71	0.89

Table 23. Freight traffic by mode of transport, 1985 and 1989

Subregion, country	Railway net ton-km			Maritime freight			Air freight		
	millions	1985	1989	Average annual growth rate (%)	thousand metric tons	1985	1989	1985-89	Average annual growth rate (%)
	1985	1989	1985-89		1985	1989	1985-89		
NORTH AFRICA	16605	17555	2.20	238715	253750	2.16	...	...	...
Algeria	5797	5980	1.71	62367	65600	1.35	53628	54270	1.22
Egypt	2594	2690	1.65	53430	55300	2.55	91230	94600	0.86
Libyan Arab Jamahiriya	-	-	0.00	71478	76100	1.98	...	...	...
Morocco	4650	4865	1.25	33500	36280	2.27	41889	45400	1.60
Sudan	1860	1920	1.68	4540	4950	2.44	...	...	...
Tunisia	1704	2100	4.46	13400	15520	3.46	17474	19060	2.38
WEST AFRICA	10054	10733	1.63	154362	161738	1.83	...	...	...
Benin	179	211	3.60	1007	1290	6.65	8319	8840	1.95
Burkina Faso	-	-	0.00	-	-	0.00	6041	6920	1.13
Cape Verde	-	-	0.00	599	696	4.93	1297	1460	2.39
Cote d'Ivoire	544	595	2.35	9411	9890	1.30	36126	37800	0.90
Gambia	-	-	0.00	335	380	3.44	1116	1380	4.96
Ghana	80	119	15.06	4800	5190	1.93	2815	3019	1.65
Guinea	534	605	2.69	10411	10930	1.30	...	...	...
Guinea-Bissau	-	-	0.00	252	338	9.21	...	...	...
Liberia	-	-	0.00	23130	24090	1.48	4448	4750	2.17
Mali	165	202	5.04	-	-	0.00	7727	9000	4.44
Mauritania	6365	6610	0.97	9389	9780	1.25	2081	2362	4.44
Niger	-	-	0.00	-	-	0.00	11988	12400	1.84
Nigeria	1709	1812	1.97	88117	91700	1.79	...	...	...
Senegal	468	565	7.26	4980	5230	2.43	20453	20500	0.08
Sierra Leone	-	-	0.00	549	310	4.74	2420	2035	4.21
Togo	10	14	7.07	1378	1602	4.17	4687	5300	3.34
CENTRAL AFRICA	3065	3058	3.16	32788	38440	5.34	...	...	...
Burundi	-	-	0.00	-	-	0.00	9214	10000	3.51
Cameroon	996	720	2.67	12615	13900	5.58	31306	32000	1.32
Central African Republic	-	-	0.00	-	-	0.00	8828	9410	7.76
Chad	-	-	0.00	-	-	0.00	5853	8030	9.85
Congo	494	550	2.77	9029	10610	2.36	4269	4620	1.58
Equatorial Guinea	-	-	0.00	129	164	1.55	4752	5110	2.25
Gabon	-	-	0.00	8149	9630	6.34	30440	32590	1.37
Rwanda	-	-	0.00	-	-	0.00	35736	38000	1.77
Sao Tome and Principe	-	-	0.00	30	36	4.47	...	...	...
Zaire	1599	1788	3.46	2836	4100	0.47	23571	24300	0.26
EAST AND SOUTHERN AFRICA	17822	19597	2.13	33957	40956	2.68	...	...	...
Angola	1615	1803	1.25	11120	12410	3.20	...	...	...
Botswana	1323	1370	0.86	-	-	0.00	...	...	...
Comoros	-	-	0.00	105	118	2.37	...	...	...
Djibouti	-	-	0.00	1153	1320	1.19	9786	10060	0.70
Ethiopia	128	149	4.99	3156	3815	7.49	18862	20660	1.96
Kenya	1858	2160	1.36	6315	7590	3.13	60442	62850	1.38
Lesotho	-	-	0.00	-	-	0.00	141	154	2.55
Madagascar	108	125	0.98	1163	1605	8.67	9540	10050	1.26
Malawi	94	113	0.27	-	-	0.00	7574	6010	8.91
Mauritius	-	-	0.00	1692	2340	7.36	8154	19600	22.28
Mozambique	1134	1340	4.43	4537	5750	2.42	8894	8900	0.29
Seychelles	-	-	0.00	240	298	6.72	1537	1734	7.47
Somalia	-	-	0.00	1239	1670	16.52	...	...	...
Swaziland	2624	2785	1.41	-	-	0.00	317	379	6.36
Tanzania, United Rep. of	1288	1420	1.70	3237	4040	4.34	6708	6970	1.82
Uganda	61	82	1.66	-	-	0.00	6148	7470	1.32
Zambia	1407	1520	1.65	-	-	0.00	17516	18760	1.72
Zimbabwe	6204	6730	1.03	-	-	0.00	21118	21260	1.56
TOTAL AFRICA	47546	50943	1.01	459822	494884	2.43	...	...	...

Table 24. Current revenue of Central Governments, 1985 and 1989

Subregion, country	Current revenue (millions of dollars)						Total revenue (as percent of GDP)	
	Taxes		Non taxes		Total		1985	1989
	1985	1989	1985	1989	1985	1989		
NORTH AFRICA								
Algeria	7974	11147	15072	3314	23046	14461	38.26	33.82
Egypt	9289	12164	7843	7736	17131	19900	35.05	31.74
Libyan Arab Jamahiriya	2602	4211	1451	1780	4053	5991	13.14	17.30
Morocco	2501	462	1896	6824	4397	7286	32.66	30.19
Sudan	514	474	80	263	594	737	12.61	10.23
Tunisia	...	2261	...	743	2189	3004	23.98	28.61
WEST AFRICA								
Benin	119	163	15	75	134	238	10.16	13.66
Burkina Faso	143	308	41	51	184	360	11.36	13.95
Cape Verde	18	...	6	...	25	...	16.64	...
Cote d'Ivoire	1614	2864	1304	606	2918	3470	35.15	34.08
Gambia	42	...	8	...	50	...	23.07	...
Ghana	531	381	141	57	672	438	12.22	9.51
Guinea	...	...	...	...	...	...	...	...
Guinea-Bissau	...	...	...	...	...	...	...	...
Liberia	149	...	40	...	189	...	17.92	...
Mali	132	296	22	31	155	327	12.32	14.21
Mauritania	121	164	40	64	162	228	25.62	23.15
Niger	165	283	246	546	411	828	24.03	35.03
Nigeria	6933	1327	8392	1387	15325	2714	19.00	8.44
Senegal	471	898	64	7	535	891	17.97	16.38
Sierra Leone	41	21	9	12	50	9	5.48	1.23
Togo	190	350	27	15	217	365	24.25	23.52
CENTRAL AFRICA								
Burundi	155	120	8	1	163	121	12.91	13.62
Cameroon	1172	1693	468	1652	1640	3345	16.15	27.19
Central African Republic	100	192	9	1	110	193	13.07	16.36
Chad	46	76	11	10	56	86	6.60	7.51
Congo	356	687	458	26	814	661	31.70	27.98
Equatorial Guinea	17	36	4	...	21	36	23.46	21.35
Gabon	1057	1309	614	1009	1671	2318	38.40	60.33
Rwanda	...	...	...	...	...	...	...	...
Sao Tome and Principe	...	...	...	...	24	...	49.74	53.30
Zaire	321	144	278	122	599	266	22.38	18.00
EAST AND SOUTHERN AFRICA								
Angola	1904	...	747	...	2651	...	49.43	48.20
Botswana	299	1062	64	244	363	1307	45.97	66.66
Comoros	8	15	10	15	17	29	12.60	11.58
Djibouti	87	...	30	...	117	...	34.46	39.81
Ethiopia	543	797	1023	1497	1567	2294	32.79	38.43
Kenya	1087	1629	165	210	1252	1840	20.24	23.32
Lesotho	75	110	11	5	86	115	43.55	26.55
Madagascar	242	147	17	11	260	158	10.62	9.29
Malawi	221	196	42	55	263	250	22.68	15.10
Mauritius	213	455	26	18	240	473	20.62	22.76
Mozambique	...	...	...	...	402	...	12.80	36.38
Seychelles	48	83	20	54	68	137	37.21	45.28
Somalia	7	1	...	...	...	...	...	...
Swaziland	83	170	...	55	84	114	28.79	39.39
Tanzania, United Rep. of	1100	153	9	35	1091	188	14.92	8.71
Uganda	589	33	555	35	1144	68	668.99	15.82
Zambia	298	76	21	138	319	213	25.72	7.48
Zimbabwe	1159	1522	140	53	1299	1575	30.36	28.47

Table 25. Expenditure by Central Governments, 1985 and 1989

Subregion, country	Expenditures (millions of dollars)						Total expenditures (as percentage of GDP)		Overall surplus/deficit (as percentage of GDP)	
	Current		Capital		Total		1985	1989	1985	1989
	1985	1989	1985	1989	1985	1989				
NORTH AFRICA										
Algeria	13029	9636	11481	5602	24510	15238	40.69	35.63	5.13	-1.78
Egypt	16221	17255	9890	5800	26111	23059	53.43	39.10	20.37	...
Libyan Arab Jamahiriya	4053	4690	5741	5101	9794	9791	31.74	28.28	18.61	...
Morocco	2212	3550	1277	1715	3489	7825	25.92	32.43	1.61	2.24
Sudan	824	973	181	371	1005	1343	21.33	18.63	8.72	...
Tunisia	1669	2316	...	1365	...	3681	...	35.06	...	...
WEST AFRICA										
Benin	134	191	...	167	134	358	10.16	20.51	...	5.52
Burkina Faso	178	328	25	42	203	370	12.53	14.37	0.12	0.90
Cape Verde	...	...	...	...	...	...	...	...	...	...
Cote d'Ivoire	2248	3638	466	807	2714	4444	32.70	43.65	2.68	...
Gambia	42	32	54	...	97	...	44.76	...	1.00	...
Ghana	641	403	122	119	763	522	13.34	11.34	1.59	...
Guinea	...	...	...	...	...	...	...	...	...	...
Guinea-Bissau	...	...	...	...	...	...	...	...	...	...
Liberia	306	290	66	65	372	...	35.23	...	14.72	...
Mali	143	359	12	22	155	380	12.32	16.53	110.84	...
Mauritania	...	...	...	...	167	214	26.43	21.83	0.81	...
Niger	212	197	184	547	396	744	23.12	31.47	...	...
Nigeria	5472	980	6097	1034	11569	2015	14.35	6.27	3.77	...
Senegal	493	823	42	81	535	903	17.97	16.61	...	...
Sierra Leone	43	23	49	18	92	41	10.04	5.82	9.38	...
Togo	207	138	10	13	217	352	24.25	22.65	1.51	...
CENTRAL AFRICA										
Burundi	168	193	39	...	207	...	16.38	...	3.46	...
Cameroon	1058	...	582	...	1640	...	16.15	...	0.00	...
Central African Republic	91	...	48	...	139	...	16.57	...	3.50	...
Chad	...	...	...	...	62	...	7.28	...	1.09	...
Congo	857	...	301	...	1158	...	45.09	...	13.70	...
Equatorial Guinea	19	...	2	...	20	...	22.52	...	0.94	...
Gabon	582	...	1309	...	1891	...	41.43	...	5.27	...
Rwanda	197	...	33	...	230	...	12.40	...	2.01	...
Sao Tome and Principe	24	...	...	...	...	...	...	...	...	...
Zaire	590	...	73	...	663	...	24.75	...	2.38	...
EAST AND SOUTHERN AFRICA										
Angola	2741	...	314	...	3055	...	56.96	57.88	1.53	17.77
Botswana	164	484	129	470	293	955	37.03	48.71	11.42	11.86
Comoros	24	...	1	...	25	14	18.44	13.27	6.52	...
Djibouti	115	...	17	...	132	...	38.97	...	1.20	...
Ethiopia	1169	...	756	...	1924	...	40.27	...	7.48	...
Kenya	1340	...	545	...	1885	...	30.47	...	10.28	...
Lesotho	66	108	46	71	102	180	47.79	41.52	3.16	9.78
Madagascar	580	303	110	91	690	329	28.26	19.39	...	...
Malawi	217	...	82	...	300	...	25.81	...	3.46	...
Mauritius	258	...	41	...	298	514	25.64	24.71	4.23	1.44
Mozambique	585	...	...	...	...	...	...	...	...	...
Seychelles	82	131	22	46	104	181	57.04	59.80	14.92	7.53
Somalia	233	...	198	...	431	...	20.98	...	...	...
Swaziland	61	...	22	...	82	...	28.43	...	2.87	...
Tanzania, United Rep. of	1661	...	353	...	2013	...	27.54	...	10.27	...
Uganda	1265	...	270	...	1535	...	897.51	...	728.52	...
Zambia	334	...	49	...	383	...	30.89	...	8.23	...
Zimbabwe	1497	1974	113	310	1611	2184	37.66	39.49	7.10	4.80
TOTAL AFRICA										

Table 26. Monetary Indicators, 1984 or 1985 and 1988 or 1989

(Millions of dollars)

Subregion, country	Foreign assets (net)		Domestic credit		Claims on Government (net)		Money		Quasi money	
	1985	1989	1985	1989	1985	1989	1985	1989	1984	1988
NORTH AFRICA	8745	2090	111831	164876	50690	...	83986	79022	30242	66662
Algeria	3118	812	52639	46441	16056	20373	42370	31126	2788	6055
Egypt	916	1342	53820	71635	24361	34492	20994	20428	19266	48529
Libyan Arab Jamahiriya	6788	3995	11584	23091	4556	...	11793	12058	4944	6109
Morocco	914	56	5941	11407	3893	6553	4451	8421	1413	2999
Sudan	1429	2182	2332	5264	1092	3342	1658	4199	735	655
Tunisia	266	751	5515	7038	732	790	2720	2790	1096	2315
WEST AFRICA	...	...	...	...	...	...	17503	...	...	...
Benin	...	...	399	...	15	...	230	...	44	86
Burkina Faso	82	...	191	...	49	...	184	...	55	158
Cape Verde	...	...	...	...	...	...	...	...	...	...
Cote d'Ivoire	870	...	3406	...	587	...	1641	...	524	1208
Gambia	97	...	152	...	43	...	47	...	16	27
Ghana	554	...	1297	...	801	...	639	...	103	145
Guinea	...	...	...	...	...	...	...	...	...	...
Guinea-Bissau	...	...	...	...	...	...	...	...	...	...
Liberia	289	...	530	...	402	...	114	...	55	67
Mali	111	...	488	...	236	...	301	...	21	86
Mauritania	119	...	262	...	46	...	158	...	25	52
Niger	5	...	304	...	70	...	213	...	47	...
Nigeria	1816	...	31900	...	18297	...	13227	...	11187	3168
Senegal	685	...	1404	...	399	...	512	...	199	395
Sierra Leone	305	...	336	...	307	...	173	...	89	32
Togo	209	...	164	...	13	...	219	...	95	264
CENTRAL AFRICA	...	...	...	...	...	...	2938	...	...	...
Burundi	13	...	247	...	135	...	162	...	44	48
Cameroon	415	...	2210	...	113	...	1129	...	679	1018
Central African Republic	33	...	137	...	44	...	136	...	8	27
Chad	42	...	176	...	5	...	181	...	5	1
Congo	127	...	604	...	71	...	296	...	44	141
Equatorial Guinea	...	...	...	...	...	...	...	...	...	...
Gabon	129	...	829	...	27	...	466	...	219	337
Rwanda	98	...	178	...	20	...	157	...	63	172
Sao Tome and Principe	...	...	...	...	...	...	...	...	...	...
Zaire	650	...	950	...	844	...	410	...	33	91
EAST AND SOUTHERN AFRICA	...	...	...	...	...	...	6508	...	...	...
Angola	...	...	...	...	...	...	...	...	...	...
Botswana	790	...	199	...	306	...	90	...	140	425
Comoros	14	...	15	...	6	...	19	...	2	12
Djibouti	112	...	169	...	25	...	110	...	103	136
Ethiopia	86	...	2367	...	1330	...	1305	...	551	758
Kenya	234	...	39515	...	1273	...	794	...	15458	25480
Lesotho	82	...	71	...	34	...	52	...	74	114
Madagascar	285	...	1277	...	655	...	375	...	28	51
Malawi	144	...	408	...	216	...	99	...	150	147
Mauritius	111	...	703	...	430	...	166	...	266	967
Mozambique	...	...	...	...	...	...	...	...	...	...
Seychelles	9	...	57	...	37	...	24	...	26	65
Somalia	129	...	27	...	128	...	230	...	62	54
Swaziland	72	...	66	...	3	...	30	...	86	154
Tanzania, United Rep. of	881	...	3115	...	1988	...	1546	...	530	189
Uganda	27	...	21	...	5	...	16	...	3	2
Zambia	1161	...	1300	...	1063	...	216	...	379	488
Zimbabwe	122	...	1390	...	224	...	619	...	717	957
TOTAL AFRICA	...	...	...	...	...	...	110936	...	...	...

Table 27. Merchandise trade indicators, 1985 and 1989

Subregion, country	Total trade (Millions of dollars)						Average annual Growth rate (Percentage)		Terms of Trade 1980 = 100	
	Exports		Imports		Balance		Exports	Imports	1985	1989
	1985	1989	1985	1989	1985	1989	1985-89	1985-89		
NORTH AFRICA	31152	26890	26246	13352	4906	6462	2.4	5.5	0	0
Algeria	12841	8740	9841	9160	3000	-420	7.0	3.6	101	0
Egypt	1838	2634	4930	7378	3092	4744	8.8	8.7	99	0
Libya	12314	8747	4102	5716	8212	3031	8.0	10.5	95	0
Morocco	2165	3336	3849	5492	1684	-2156	12.5	9.1	82	0
Sudan	367	500	926	1235	-559	-735	11.0	7.0	92	0
Tunisia	1627	2933	2597	4170	-970	1437	16.0	13.7	98	96
WEST AFRICA	19467	15250	12716	10088	6751	5162	4.6	4.1	0	0
Benin	157	134	334	320	177	186	4.5	2	103	0
Burkina Faso	70	214	333	519	263	305	11.9	11.4	95	0
Cape Verde	5	7	81	132	-76	1-5	3.9	9.6	0	0
Cote d'Ivoire	2939	2503	1742	1364	1197	1139	7.4	5.3	90	0
Gambia	43	57	93	160	-50	103	13.2	14.9	41	0
Ghana	623	973	866	930	-243	43	11.1	2.9	34	0
Guinea	459	561	448	335	11	226	3.5	7.7	0	0
Guinea-Bissau	14	9	60	82	-46	73	7.4	10.8	0	0
Liberia	436	604	284	411	152	193	2.6	2.3	90	0
Mali	124	163	411	479	-287	316	8.9	3.8	0	0
Mauritania	374	437	234	222	140	215	2.4	8	98	0
Niger	259	308	369	316	-110	8	5.2	2.2	81	0
Nigeria	13113	8138	6205	3419	6908	4719	7.7	11.5	94	0
Senegal	554	772	812	985	-258	213	9.2	6.5	134	0
Sierra Leone	106	138	154	189	-48	51	8.4	3.8	65	0
Togo	190	331	288	344	-98	13	13.7	8.3	140	0
CENTRAL AFRICA	4798	5436	4578	4613	220	823	3.5	4	0	0
Burundi	113	78	188	179	-75	101	9.8	9	0	0
Cameroon	722	1190	1151	1126	-429	64	1.4	3.3	79	0
Central African Republic	92	134	113	150	-21	16	5.6	1.6	94	0
Chad	88	149	240	430	-152	281	15.1	16.7	87	0
Congo	1087	912	581	524	506	388	7.6	2.3	105	0
Equatorial Guinea	25	41	27	55	-2	14	9.2	14.4	0	0
Gabon	1974	1582	976	957	998	625	6	2.6	101	0
Rwanda	98	95	294	331	-196	238	1.8	4.4	69	0
Sao Tome & Principe	8	5	11	10	-3	5	4.9	1.9	0	0
Zaire	591	1249	997	849	-406	400	16.3	4.5	88	0
EAST AND SOUTHERN AFRICA	7983	11417	9528	13695	1545	2278	10.1	9.7	0	0
Angola	2261	2532	665	1515	1596	1017	6.5	21.7	102	0
Botswana	731	1830	581	1283	150	547	26.7	23.7	74	0
Comoros	16	18	37	60	-21	42	1.9	13.4	0	0
Djibouti	14	30	201	237	-187	207	13.2	3.5	0	0
Ethiopia	334	437	989	955	-655	-518	4.5	8	106	0
Kenya	989	1031	1457	2166	-468	1135	4	10.3	75	65
Lesotho	23	66	362	457	-339	391	36.2	8.7	0	0
Madagascar	274	312	402	440	-128	28	1.6	3.0	102	0
Malawi	249	268	295	506	-46	238	3.0	16.6	101	79
Mauritius	460	1017	529	1326	-69	309	21.8	28.0	101	131
Mozambique	81	101	461	819	-378	-718	7	5.4	93	0
Seychelles	28	31	99	164	-71	133	8.1	15.3	115	79
Somalia	91	85	112	155	-21	70	4.4	11.7	101	0
Swaziland	178	361	321	483	-143	122	18.2	11.9	0	0
Tanzania	340	300	1031	535	-691	235	4.6	12.5	88	0
Uganda	380	250	375	652	-5	402	8.5	11.8	21	0
Zambia	547	1348	714	873	-167	475	26.1	7.6	262	0
Zimbabwe	986	1400	897	1170	-89	230	10.6	5.5	123	0
TOTAL AFRICA	63401	58992	53069	61750	10332	2758	6	3.8	0	0

Table 28. Exports by commodity class, 1985 and 1989

(Millions of dollars)

Primary Commodities

Subregion, Country	Total		Food, Beverages, and Tobacco		Raw Materials, Excluding Fuels		Fuels	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	26210	20820	932	1466	1210	1627	24068	17727
Algeria	9990	8335	56	37	33	59	9901	8239
Egypt	1579	1370	101	236	225	260	1253	874
Libya	12136	7939			2		12134	7939
Morocco	1255	1720	560	871	611	763	84	88
Sudan	355	480	106	117	239	361	10	2
Tunisia	895	976	109	205	100	184	686	587
WEST AFRICA	18282	14082	2952	3264	2140	2786	13190	9832
Benin	124	106	26	22	57	49	41	35
Burkina Faso	51	123	11	15	40	108		
Cape Verde	5	7	4	6	1	1		
Cote d'Ivoire	2394	2248	1731	1827	404	259	259	162
Gambia	41	53	8	13	33	40		
Ghana	502	590	421	488	46	45	10	55
Guinea	401	490	23	28	178	462		
Guinea Bissau	12	8	6	4	6	4		
Liberia	424	490	31	36	390	451	3	3
Mali	114	141	26	51	88	90		
Mauritania	372	434	187	218	185	216		
Niger	202	300	31	47	171	248		5
Nigeria	12997	8013	273	368	21	251	12703	7594
Senegal	369	651	78	214	149	273	142	163
Sierra Leone	93	119	51	38	18	74	4	7
Togo	181	309	45	89	133	215	3	5
CENTRAL AFRICA	4237	4192	790	1219	587	702	2849	2271
Burundi	100	70	98	68	2	2		
Cameroon	738	891	328	568	106	172	104	151
Central African Republic	63	73	26	33	37	38		
Chad	77	143	15	63	54	64	8	16
Congo	1049	869	16	20	19	22	1014	827
Equatorial Guinea	23	39	17	29	6	10		
Gabon	1806	1488	8	4	272	225	1526	1259
Rwanda	129	95	111	80	18	15		
Sao Tome & Principe	7	5	6	4	1	1		
Zaire	245	521	165	350	72	153	8	18
EAST AND SOUTHERN AFRICA	5626	6337	2934	3394	601	694	2091	2249
Angola	1975	2203	158	177	8	9	1809	2017
Botswana	97	122	61	60	36	61	1	1
Comoros	11	13	9	11	1	1	1	1
Djibouti	7	9	7	9				
Ethiopia	133	410	235	310	65	72	33	28
Kenya	865	831	622	601	87	114	156	116
Lesotho	14	23	3	12	11	11		
Madagascar	255	284	227	259	17	16	11	9
Malawi	231	253	217	245	14	8		
Mauritius	219	363	217	355	2	8		
Mozambique	73	81	46	62	15	13	12	8
Seychelles	26	29	2	14	1	1	23	14
Somalia	90	84	84	78	4	4	2	4
Swaziland	160	269	94	171	51	75	15	23
Tanzania	100	260	204	193	84	66	12	10
Uganda	174	242	154	217	19	24	1	7
Zambia	14	35	3	10	4	9	7	16
Zimbabwe	582	817	391	610	182	202	9	5
TOTAL AFRICA	54355	45431	7608	9343	4538	5809	42209	30279

Table 28. Exports by commodity class, 1985 and 1989 (continued)

(Millions of dollars)

Sub-region, Country	Manufactured goods					
	Total		Textiles, Articles of apparel and clothing		Other manufactures	
	1985	1989	1985	1989	1985	1989
NORTH AFRICA	2243	6046	950	1	1293	6045
Algeria	160	405			160	
Egypt	258	1264	312			
Libya	180	805			180	805
Morocco	910	1616	313		597	
Sudan	8	12		1		11
Tunisia	727	1944	325		402	
WEST AFRICA	500	718	44		456	718
Benin	30	25				
Burkina Faso	19	91				
Cape Verde						
Cote d'Ivoire	251	240	43		208	
Gambia	1	2				
Ghana	28	100			28	
Guinea						
Guinea Bissau	1	1			1	1
Liberia	4	5			4	
Mali	7	19				
Mauritania	3	3			3	
Niger	7	8				
Nigeria	10	87			10	
Senegal	119	121				
Sierra Leone	11	16			11	
Togo	9	20			9	
CENTRAL AFRICA	594	1194	17		578	1194
Burundi	8	5	3		5	
Cameroon	75	280	13		62	
Central African Republic	22	60			22	
Chad	2	5				
Congo	38	43			38	
Equatorial Guinea	1	1				
Gabon	114	94			114	
Rwanda						
Sao Tome & Principe						
Zaire	334	706			334	
EAST AND SOUTHERN AFRICA	2279	4851	220		2060	4851
Angola	281	314				
Botswana	630	1694				
Comoros	5	6			5	
Djibouti						
Ethiopia	3	25	1		2	
Kenya	124	160	7		117	
Lesotho	8	41				
Madagascar	31	29	16		15	
Malawi	18	15				
Mauritius	215	624	175		40	
Mozambique	2	10			2	
Seychelles	2	3			2	
Somalia						
Swaziland	18	43				
Tanzania	19	31				
Uganda	6	7				
Zambia	521	1301				
Zimbabwe	376	550	20		356	
TOTAL AFRICA	5617	12832	1230	2	4386	12830

Table 29. Destination of merchandise exports, 1985 and 1989

(Millions of dollars)

Subregion, Country	Total Exports		Developed Market Economies		Developing Market Economies		Centrally Planned Economies	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	30358	28377	24040	21972	3746	3911	2053	2128
Algeria	10148	9569	8997	8137	842	1193	308	105
Egypt	3714	4326	2323	2454	390	768	770	906
Libya	12437	7560	9772	6365	1597	457	709	709
Morocco	2165	3337	1465	2503	502	692	181	180
Sudan	367	652	121	256	203	246	43	149
Tunisia	1527	2933	1362	2257	212	555	42	79
WEST AFRICA	18960	19183	15418	14634	2779	3346	387	483
Benin	158	95	144	50	14	34		11
Burkina Faso	73	125	38	62	32	22	3	40
Cape Verde	5	9	1	5	4	4		
Cote d'Ivoire	2669	3153	1933	1872	477	828	163	63
Gambia	43	139	20	126	5	12	1	
Ghana	523	1071	348	771	42	127	70	173
Guinea	472	576	412	506	42	33	18	38
Guinea-Bissau	14	6	5	6	1			
Liberia	433	504	402	456	9	45		3
Mali	121	176	65	93	40	73	1	9
Mauritania	334	652	217	466	40	81	76	22
Niger	209	326	165	276	43	46		2
Nigeria	13072	11050	11239	9194	1793	1788	39	68
Senegal	538	869	240	473	196	201	2	18
Sierra Leone	106	137	49	90	6	8		
Togo	190	295	140	188	35	44	14	36
CENTRAL AFRICA	5279	6649	4377	5679	501	840	167	122
Burundi	111	78	98	75	11	3		
Cameroon	787	1789	623	1408	158	338	6	43
Central African Republic	92	115	89	106	3	5		4
Chad	88	66	42	56	12	8		2
Congo	1087	1135	1029	1080	56	49	2	4
Equatorial Guinea	35	41	26	32	9	8		1
Gabon	1974	1570	1523	1253	219	259	159	51
Rwanda	98	121	17	35	8	87		
Sao Tome & Principe	7	8	5	8				
Zaire	1000	1726	925	1626	25	83		17
EAST AND SOUTHERN AFRICA	7544	12206	5620	9263	1227	2222	201	552
Angola	2253	3036	1673	2506	144	314	32	217
Botswana	738	1830	706	1738	29	89		
Comoros	16	26	14	21	1	4		
Djibouti	24	53	2	3	22	49		
Ethiopia	338	452	240	322	67	85	30	44
Kenya	993	1157	552	672	377	380	17	14
Lesotho	23	66	22	62	1	4		
Madagascar	286	336	226	261	38	49	6	26
Malawi	235	267	203	235	33	31		
Mauritius	436	985	416	912	17	56	1	14
Mozambique	79	359	56	111	9	206	14	42
Myanmar	26	114	3	61	2	33		
Somalia	109	170	11	48	97	121		1
Swaziland								
Tanzania	273	312	202	210	68	87	3	10
Uganda	380	270	337	250	41	15		5
Zambia	467	1322	313	923	119	364	36	36
Zimbabwe	868	1451	644	928	162	335	62	143
TOTAL AFRICA	62141	66415	49455	51548	8253	10319	2808	3285

Table 29. Destination of merchandise exports, 1985 and 1989 (continued)

(Millions of dollars)

Subregion, Country	Developed Market Economies							
	EEC		USA		Japan		Others	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	21117	18141	1207	2199	313	504	1373	1128
Algeria	7522	5908	1011	1801	105	144	159	284
Egypt	1630	1602	34	244	114	147	545	461
Libya	9453	6130				1	319	234
Morocco	1268	2157	30	73	93	154	74	119
Sudan	79	183	12	13	30	52	...	8
Tunisia	1165	2161	120	68	1	6	76	22
WEST AFRICA	11714	7598	1812	5710	240	388	453	939
Benin	101	40	28	7	3	1	12	2
Burkina Faso	30	59			1	2	7	3
Cape Verde	1	4		2				
Cote d'Ivoire	1537	1541	338	232	30	30	28	69
Gambia	6	38		2	13	83	1	3
Ghana	236	549	51	122	60	65	1	35
Guinea	272	328	127	146	3	3	12	29
Guinea Bissau	5	5						1
Liberia	315	238	84	23	2	2	1	193
Mali	59	71	6	7		1		14
Mauritania	157	283		11	58	172	2	9
Niger	152	265		2	50			9
Nigeria	8451	1566	2368	5103	8	4	413	521
Senegal	224	406	1	38	13	22	2	7
Sierra Leone	41	77	6	12			2	7
Togo	127	128	3	3	1	3	9	54
CENTRAL AFRICA	2919	3943	1257	1513	31	143	170	80
Burundi	85	62	7	1	1	3	5	9
Cameroon	528	1085	88	296	6	19	1	8
Central African Republic	84	101		3		1	5	1
Chad	40	45				7	2	4
Congo	375	580	652	486		10	2	4
Equatorial Guinea	26	32						
Gabon	976	769	476	409	14	52	57	23
Rwanda	15	29	1	4		1	1	1
Sao Tome & Principe	5	8						
Zaire	785	1232	33	314	10	50	97	30
EAST AND SOUTHERN AFRICA	2935	4004	1476	2423	293	787	836	2049
Angola	688	541	982	1824	3	64	...	77
Botswana	53	56	38	3	2	1	613	1678
Comoros	8	14	6	7				
Djibouti	2	3						
Ethiopia	155	201	15	65	35	48	15	8
Kenya	429	526	66	60	8	15	49	71
Lesotho	3	3		2			19	57
Madagascar	158	174	38	36	29	39	1	12
Malawi	137	156	26	26	8	18	32	35
Mauritius	338	740	65	136		3	13	33
Mozambique	26	70	14	19	13	15	3	7
Seychelles	1	55	1	5	1		...	1
Somalia	11	46						4
Swaziland	...	...	...	...	...	...	...	...
Tanzania	164	145	5	36	11	14	22	15
Uganda	205	192	108	40	10	9	14	9
Zambia	172	454	14	43	109	195	18	31
Zimbabwe	385	628	78	121	44	166	137	13
TOTAL AFRICA	38685	33686	6952	11845	887	1822	2932	4196

Table 29. Destination of merchandise exports, 1985 and 1989 (continued)

(Millions of dollars)

Subregion, Country	Developing Market Economies							
	Africa		America		Asia		Others	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	467	837	243	602	2084	1798	948	674
Algeria	148	111	163	385	177	552	350	241
Egypt	10	146	18	3	294	576	28	43
Libya	55	65		152	1031	38	511	202
Morocco	111	270	32	125	140	270	19	23
Sudan	39	4			133	83	31	159
Tunisia	84	241	10	23	109	279	9	12
WEST AFRICA	1216	1820	1387	1095	110	350	60	81
Benin	11	18			1	14	2	2
Burkina Faso	19	17			13	6		
Cape Verde	4	3			1	1		
Cote d'Ivoire	416	664	2	5	49	98	10	61
Gambia	4	7			1	5		
Ghana	28	82			8	41	6	1
Guinea	34	10		2			8	1
Guinea Bissau							1	
Liberia	9	3		6		34		2
Mali	17	60			6	13	17	
Mauritania	28	78			12	3		
Niger	43	45			1	1		
Nigeria	442	619	1346	1074	3	87	2	8
Senegal	143	150	33	1	18	26	2	4
Sierra Leone	1	6	5	6				1
Togo	17	23	31	2	5	23	12	
CENTRAL AFRICA	341	330	78	168	12	125	58	31
Burundi	9	2			2	1		
Cameroon	158	279		7		49		1
Central African Republic	3	1				3		
Chad	12	2				5		3
Congo	18	28		14	18	3		4
Equatorial Guinea	6	8					1	
Gabon	88	74	68	133	12	27	51	21
Rwanda	8	83				2		2
Sao Tome & Principe								
Zaire	19	43	2	10		35	4	5
EAST AND SOUTHERN AFRICA	616	829	143	322	434	760	34	111
Angola	2		142	311		3		1
Botswana	29	88						
Comoros	1					4		
Djibouti	5	23					17	26
Ethiopia	20	25			45	1	2	59
Kenya	256	233			118	86	3	47
Lesotho		3			1	1		
Madagascar	11	24			27	24		1
Malawi	32	28			1	2		1
Mauritius	11	33		9	6	11		3
Mozambique	9	4		1		201		
Seychelles	1	2			1	31		
Somalia	5	1			92	1		118
Swaziland								
Tanzania	15	13			51	69	2	5
Uganda	35	4				2	6	9
Zambia	36	85	1		78	262	4	17
Zimbabwe	148	259		1	14	58		23
TOTAL AFRICA	2640	3996	1847	2187	2666	3033	1099	1103

Table 30. Imports by commodity class, 1985 and 1989

(Millions of dollars)

Subregion, Country	Primary Commodities									
	Total		Food		Beverages, and Tobacco		Fuels		Others	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	9216	11133	4803	6170	222	437	1980	1978	2211	2748
Algeria	3101	3481	2147	2420	43	30	190	242	726	789
Egypt	1889	2623	1128	1747	103	73	187	178	471	625
Libya	791	1130	624	711	13	229	29	12	125	178
Morocco	2184	2058	474	525	35	63	1076	846	599	624
Sudan	315	601	164	234	7	15	130	298	14	34
Tunisia	936	1440	271	533	21	27	368	402	276	478
WEST AFRICA	4191	3073	2143	1320	174	191	1278	1216	596	346
Benin	107	103	39	37	48	16	16	16	4	4
Burkina Faso	176	137	100	54	8	10	43	51	25	22
Cape Verde	37	50	20	27	4	5	9	12	4	6
Cote d'Ivoire	710	474	261	227	33	14	382	187	34	26
Gambia	42	89	25	51	5	8	8	26	3	4
Ghana	322	440	35	92	13	4	253	331	21	13
Guinea	87	65	24	18	8	6	48	36	7	5
Guinea Bissau	16	24	10	14	1	2	4	5	1	3
Liberia	171	125	95	54	5	4	62	63	9	4
Mali	126	183	56	91	4	9	61	74	5	9
Mauritania	74	72	33	32	2	2	33	32	6	6
Niger	181	163	120	101	4	5	38	35	19	22
Nigeria	1486	406	1054	234	8	15	54	29	370	128
Senegal	473	523	172	184	12	15	213	265	76	59
Sierra Leone	85	97	47	40	3	6	33	35	2	36
Togo	98	122	53	64	16	20	20	19	10	19
CENTRAL AFRICA	1130	1074	627	579	92	86	267	274	144	135
Burundi	66	59	26	23	1	1	34	31	5	5
Cameroon	188	221	91	147	18	24	42	17	37	31
Central African Republic	28	30	15	19	7	4	2	3	4	4
Chad	58	130	22	50	4	7	27	61	5	12
Congo	135	98	95	59	12	12	18	17	10	10
Equatorial Guinea	14	23	6	12	1	2	5	10	2	3
Gabon	206	134	135	74	33	21	17	18	21	21
Rwanda	119	107	40	29	4	5	45	51	30	22
Sao Tome & Principe	6	4	2	1	1	1	2	2	1	1
Zaire	310	284	195	166	11	9	75	64	29	25
EAST AND SOUTHERN AFRICA	3602	4171	1162	1647	128	201	1785	1623	527	700
Angola	220	502	168	383	10	22	4	10	38	87
Botswana	203	370	82	179	11	28	67	93	43	70
Comoros	23	37	16	27	1	1	6	9		
Djibouti	101	119	42	49	22	26	30	36	7	8
Ethiopia	473	358	242	206	4	11	146	84	81	57
Kenya	640	555	29	71	3	5	462	356	96	123
Lesotho	120	154	64	87	16	19	32	39	8	9
Madagascar	163	151	44	82	3	3	93	73	23	15
Malawi	71	119	14	23	2	2	39	73	16	21
Mauritius	208	321	88	154	2	5	75	99	43	63
Mozambique	234	414	95	168	34	60	70	124	35	62
Seychelles	45	61	15	27	2	3	26	30	2	1
Somalia	36	51	23	32	1	2	2	2	10	15
Swaziland	128	145	24	56	8	8	87	72	9	9
Tanzania	351	134	88	32	2	1	218	65	43	36
Uganda	92	158	21	38	2	3	58	102	11	15
Zambia	195	245	65	25	2	1	156	197	12	22
Zimbabwe	299	277	32	28	3	3	214	159	50	87
TOTAL AFRICA	18139	19651	8735	9716	616	915	5310	5091	3478	3929

Table 30. Imports by commodity class, 1985 and 1989 (continued)

(Millions of dollars)

Manufactured Goods

Subregion, Country	Total		Chemicals		Machinery, and Transport Equipment		Others	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	16956	21130	2100	4227	7780	9145	7076	8358
Algeria	6710	5676	745	1639	4250	2156	2715	1881
Egypt	3040	4756	450	1008	1250	2050	1340	1698
Libya	3287	4512	231	501	1651	2036	1405	1975
Morocco	1665	1246	312	577	690	1535	663	1134
Sudan	612	629	114	104	259	316	239	209
Tunisia	1636	2911	248	398	680	1052	708	1461
WEST AFRICA	8315	6862	1612	1490	1672	3012	3031	2360
Benin	222	212	18	17	72	69	132	126
Burkina Faso	158	182	14	74	65	160	59	148
Cape Verde	44	60	5	6	15	20	24	34
Cote d'Ivoire	1011	886	221	254	385	292	405	340
Gambia	48	66	5	8	15	20	28	38
Ghana	519	440	108	102	228	193	183	145
Guinea	247	185	40	40	140	105	67	50
Guinea Bissau	41	58	3	5	22	30	16	23
Liberia	154	184	24	17	66	94	64	73
Mali	238	287	26	32	131	158	81	97
Mauritania	162	151	6	6	122	115	34	32
Niger	162	150	28	29	71	65	61	56
Nigeria	4708	4014	974	780	2123	1370	1613	864
Senegal	339	461	79	84	132	194	128	183
Sierra Leone	68	94	8	8	33	46	27	40
Togo	194	230	31	38	54	81	107	111
CENTRAL AFRICA	3375	1505	458	511	1515	1591	1402	1403
Burundi	119	115	16	25	34	44	49	46
Cameroon	964	896	152	164	401	401	411	331
Central African Republic	81	120	13	19	36	54	32	47
Chad	131	296	31	70	55	124	45	102
Congo	446	428	49	44	205	200	192	184
Equatorial Guinea	12	26	1	3	5	11	6	12
Gabon	764	817	74	79	376	402	314	336
Rwanda	174	225	18	19	64	84	92	122
Sao Tome & Principe	5	4	1	1	3	2	1	1
Zaire	679	578	103	87	316	269	260	222
EAST AND SOUTHERN AFRICA	5808	9160	1034	1493	2630	4211	2144	3456
Angola	423	962	71	161	166	379	186	422
Botswana	350	801	37	80	178	410	135	311
Comoros	13	23	1	2	4	7	8	14
Djibouti	70	84	6	7	34	41	30	36
Ethiopia	516	597	73	75	284	375	159	147
Kenya	815	1622	228	344	357	857	230	421
Lesotho	238	296	21	32	56	70	161	191
Madagascar	301	189	18	35	171	96	82	58
Malawi	223	183	58	93	87	154	78	136
Mauritius	322	998	36	87	73	304	213	607
Mozambique	222	192	35	61	88	156	99	175
Seychelles	54	100	6	10	25	45	23	45
Somalia	75	104	4	5	49	68	22	31
Swaziland	147	224	16	37	75	75	56	112
Tanzania	681	100	102	53	355	227	224	120
Uganda	283	494	41	71	133	233	109	189
Zambia	478	603	106	134	232	294	140	176
Zimbabwe	597	889	145	206	263	421	189	262
TOTAL AFRICA	34448	41257	5204	7721	15597	17959	13647	15577

Table 31. Origin of merchandise imports, 1985 and 1989

(Millions of dollars)

Subregion, Country	Total Imports		Developed Market Economies		Developing Market Economies		Centrally Planned Economies	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	10547	43020	23944	11246	4543	6975	2024	1865
Algeria	9041	8977	8505	7163	1010	1035	326	470
Egypt	9962	17012	7178	12008	1357	2628	1074	1893
Libya	4149	5716	4181	3895	355	738	135	689
Morocco	3048	5492	2441	3715	1113	1319	294	424
Sudan	955	1453	548	760	361	552	46	141
Tunisia	2591	4370	2091	3405	347	703	149	248
WEST AFRICA	12624	15015	9343	9742	2617	4384	482	701
Benin	334	541	238	222	89	281	5	31
Burkina Faso	333	489	198	266	126	216	9	4
Cape Verde	82	122	62	99	18	20	2	
Cote d'Ivoire	1733	2469	1204	1502	478	651	48	90
Gambia	93	192	75	127	7	32	12	26
Ghana	867	1308	525	825	258	444	11	39
Guinea	380	467	294	377	75	52	8	39
Guinea Bissau	60	120	44	92	7	18	4	6
Liberia	287	311	196	175	49	105	7	30
Mali	450	534	267	292	167	215	9	14
Mauritania	215	526	158	366	42	125	14	16
Niger	346	584	209	236	101	98	12	7
Nigeria	6190	5280	5015	3661	859	1294	296	287
Senegal	812	1228	543	877	235	289	26	42
Sierra Leone	154	183	84	93	58	75	9	8
Togo	288	861	230	532	48	269	10	60
CENTRAL AFRICA	4454	5384	3526	4127	533	983	97	186
Burundi	190	182	125	112	54	59	6	9
Cameroon	1151	1381	983	1073	137	225	13	15
Central African Republic	91	222	78	125	12	61	1	5
Chad	155	190	117	148	32	39	2	3
Congo	580	600	494	467	65	117	16	16
Equatorial Guinea	27	67	16	49	4	16	7	4
Gabon	975	941	819	691	98	243	17	8
Rwanda	275	311	172	195	46	91	34	31
Sao Tome & Principe	13	43	11	42	2	3		
Zaire	997	1447	711	1225	83	133	1	89
EAST AND SOUTHERN AFRICA	8930	14047	6178	9484	2023	3516	509	680
Angola	688	1443	475	1182	140	234	23	22
Botswana	572	1283	525	1174	46	108		
Comoros	42	77	28	58	14	18		3
Djibouti	308	316	181	146	115	153	12	17
Ethiopia	988	953	693	570	87	127	202	250
Kenya	1458	2569	838	1556	591	928	28	51
Lesotho	362	457	361	456	1	1		
Madagascar	465	614	321	280	98	149	45	78
Malawi	278	503	245	444	29	53		5
Mauritius	517	1324	314	800	169	374	29	137
Mozambique	418	780	246	442	25	322	108	15
Seychelles	100	165	66	120	11	43	3	4
Somalia	239	429	145	285	90	116	4	24
Swaziland								
Tanzania	894	717	569	451	201	239	23	26
Uganda	300	489	155	277	134	199	4	14
Zambia	617	889	416	583	194	287	6	9
Zimbabwe	685	1040	601	661	59	166	25	26
TOTAL AFRICA	56555	77466	42991	54599	9716	15858	3102	5432

Table 31. Origin of merchandise imports, 1985 and 1989 (continued)

(Millions of dollars)

Developing Market Economies

Subregion, Country	Africa		America		Asia		Others	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	805	1053	770	1262	2482	1192	486	1278
Algeria	128	188	407	404	310	296	165	133
Egypt	196	201	211	173	735	1659	215	189
Libya	62	15	---	93	214	269	19	141
Morocco	134	141	101	141	869	811	9	20
Sudan	65	32	1	5	288	147	7	168
Tunisia	220	296	50	140	66	290	11	17
WEST AFRICA	1167	2112	689	1379	610	1767	152	721
Benin	16	44	14	20	35	213	4	4
Burkina Faso	102	168	1	1	21	43	1	4
Cape Verde	4	7	13	15	---	1	1	1
Cote d'Ivoire	172	556	38	72	86	187	2	36
Gambia	6	6	---	3	---	22	1	1
Ghana	219	340	26	11	12	84	1	4
Guinea	16	35	40	16	5	11	6	---
Guinea Bissau	1	6	---	2	4	10	---	---
Liberia	49	5	---	---	---	94	---	---
Mali	38	11	---	1	21	14	108	1
Mauritania	20	31	---	5	22	46	---	1
Niger	64	74	8	4	28	18	1	2
Nigeria	45	198	481	197	106	833	27	66
Senegal	130	198	54	14	51	70	---	1
Sierra Leone	34	69	1	1	23	4	---	1
Togo	29	150	1	8	16	112	---	1
CENTRAL AFRICA	411	578	40	91	62	250	---	59
Burundi	20	24	---	5	14	8	---	23
Cameroon	120	112	8	24	1	78	---	10
Central African Republic	6	33	---	26	6	2	---	---
Chad	12	38	---	---	---	---	---	1
Congo	12	29	21	1	12	34	---	1
Equatorial Guinea	4	12	---	---	---	4	---	---
Gabon	82	197	9	16	1	27	---	1
Rwanda	44	49	---	2	2	21	---	19
Sao Tome & Principe	2	---	---	---	---	---	---	1
Zaire	81	34	2	15	---	81	---	3
EAST AND SOUTHERN AFRICA	587	753	140	208	1272	1005	105	1351
Angola	24	28	115	147	---	58	1	1
Botswana	41	100	---	3	2	3	1	2
Comoros	12	6	---	---	2	8	---	4
Djibouti	23	24	---	---	10	48	62	81
Ethiopia	14	24	2	5	56	72	35	26
Kenya	35	52	7	6	546	193	3	677
Lesotho	---	---	---	---	---	---	1	1
Madagascar	5	9	6	4	87	55	---	81
Malawi	23	37	---	---	5	15	1	1
Mauritius	14	16	2	15	153	250	---	93
Mozambique	25	80	---	10	---	15	---	7
Seychelles	9	2	---	1	22	37	---	1
Somalia	14	29	2	3	72	28	2	56
Swaziland	---	---	---	---	---	---	---	---
Tanzania	66	37	3	3	121	80	11	119
Uganda	113	114	---	2	19	73	2	10
Zambia	35	49	1	2	154	54	4	182
Zimbabwe	52	136	2	7	1	16	2	7
TOTAL AFRICA	2910	4496	1619	1940	4426	6404	342	2815

Table 31. Origin of merchandise imports, 1985 and 1989 (continued)

Subregion, Country	(Millions of dollars)							
	EEC		USA		Japan		Others	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	16777	22295	2621	3808	1575	1156	2971	3987
Algeria	6122	5573	643	834	570	291	1170	765
Egypt	4208	6869	1296	2257	515	406	1159	2476
Libya	2513	3391	225		267	245	176	259
Morocco	1819	3025	236	373	91	83	295	234
Sudan	372	518	70	121	82	69	24	52
Tunisia	1743	2919	151	223	50	62	147	201
WEST AFRICA	6603	7533	1386	1048	722	649	632	512
Benin	206	175	19	20	16	12		15
Burkina Faso	129	225	50	12	10	21	9	8
Cape Verde	55	92	2	9	1		4	
Cote d'Ivoire	939	1287	119	87	86	70	60	58
Gambia	62	103	12	11	6	7		6
Ghana	401	549	50	135	52	66	22	75
Guinea	208	312	56	44	4	9	26	12
Guinea Bissau	40	83		2		3	4	4
Liberia	96	57	74	36	24	75	2	7
Mali	223	253	33	12	5	8	6	19
Mauritania	136	341	17	14	2	6	3	5
Niger	145	196	41	10	13	17	10	13
Nigeria	3292	2587	831	541	458	292	434	241
Senegal	419	736	62	76	17	28	45	37
Sierra Leone	60	74	9	8	9	11	6	
Togo	192	463	11	31	19	24	8	14
CENTRAL AFRICA	2756	3314	385	300	206	275	179	238
Burundi	98	71	11	3	12	16	4	22
Cameroon	772	871	83	46	84	74	44	80
Central African Republic	72	109	3	6	4	9		1
Chad	87	102	28	39	1	5	1	2
Congo	418	411	38	13	20	16	18	27
Equatorial Guinea	16	48						1
Gabon	652	575	100	51	50	39	17	26
Rwanda	119	140	21	4	23	41	9	10
Sao Tome & Principe	10	35		4			1	3
Zaire	512	950	101	134	12	75	86	66
EAST AND SOUTHERN AFRICA	3197	5589	698	680	529	842	1755	2374
Angola	362	995	47	107	22	28	44	52
Botswana	60	101	16	24	2	3	447	1046
Comoros	26	53	2			4		1
Djibouti	152	116	5	3	22	21	2	6
Ethiopia	352	519	160	53	60	62	121	
Kenya	506	1029	81	156	146	230	105	141
Lesotho	6	14	2	4	1	3	152	435
Madagascar	220	235	75	8	12	25	14	12
Malawi	88	210	14	18	22	48	121	168
Mauritius	174	453	15	21	31	121	94	205
Mozambique	114	291	49	45	11	43	72	63
Seychelles	45	56	3	4	5	11	12	49
Somalia	103	243	34	23	7	8	1	11
Swaziland	---	---	---	---	---	---	---	---
Tanzania	438	307	16	18	97	69		57
Uganda	121	206	5	25	21	31	8	15
Zambia	178	368	62	50	35	89	141	76
Zimbabwe	252	393	91	121	35	46	223	101
TOTAL AFRICA	29333	38731	5090	5836	3032	2922	5537	7111

Table 32. Balance of Payments and Reserves, 1985 and 1989

(Millions of dollars)

Subregion, country	Factor services (net)		Unrequited transfers (net)		Current balance		Capital transactions		Gross international reserves	
	1985	1989	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA										
Algeria	637	512	118	323	1014	383	1143	1390	1020	1902
Egypt	6173	7081	4358	5390	1816	1691	1231	1162	112	538
Libyan Arab Jamahiriya	2811	115	905	1835	1906	1563	1578	1388	2382	2011
Morocco	1965	2410	1076	1620	888	790	923	843	55	24
Sudan	2023	7243	1621	5736	1598	1577	435	2058	102	278
Tunisia	893	859	107	699	587	159	601	128	224	61
WEST AFRICA										
Benin	99	252	104	169	5	83	39	91	2	4
Burkina Faso	335	483	267	549	69	67	63	76	2	53
Cape Verde	...	...	...	...	...	...	...	...	...	...
Cote d'Ivoire	321	472	253	385	68	857	152	538	41	113
Gambia	7	24	15	41	7	17	2	5	1	10
Ghana	276	513	142	415	134	98	71	80	60	61
Guinea	...	...	...	...	...	...	...	...	...	...
Guinea Bissau	72	...	27	...	43	...	55	...	17	...
Liberia	7	...	64	...	57	...	52	...	3	...
Mali	376	353	234	283	132	86	157	94	41	48
Mauritania	429	113	113	...	116	...	118	...	27	...
Niger	217	203	153	92	64	111	37	115	5	19
Nigeria	2821	235	255	92	2566	143	2432	1395	483	1185
Senegal	441	...	138	...	272	...	258	...	8	...
Sierra Leone	1	...	19	...	-19	...	2	...	5	...
Togo	105	120	77	306	27	14	28	12	29	39
CENTRAL AFRICA										
Burundi	131	169	88	140	42	29	52	39	14	25
Cameroon	543	...	19	...	562	...	453	...	98	...
Central African Republic	105	...	57	...	49	...	57	...	18	...
Chad	228	240	131	260	87	28	93	6	21	52
Congo	164	101	1	22	161	81	119	19	...	...
Equatorial Guinea	...	55	...	38	...	17	...	41	...	...
Gabon	67	8	96	115	163	107	213	203	51	39
Rwanda	180	246	116	129	64	117	68	111	2	46
Sao Tome and Principe	21	13	5	1	16	11	10	12	1	6
Zaire	434	831	141	193	289	641	291	637	18	215
EAST AND SOUTHERN AFRICA										
Angola	...	...	...	...	...	...	...	...	...	...
Botswana	42	222	39	180	91	402	131	423	254	578
Comoros	46	39	31	42	14	3	12	1	6	5
Djibouti	...	...	...	...	...	...	...	...	...	...
Ethiopia	505	336	611	141	106	195	63	184	162	75
Kenya	305	970	193	383	110	587	71	520	48	122
Lesotho	86	84	78	48	7	36	13	43	6	11
Madagascar	282	330	98	202	184	128	174	122	22	46
Malawi	160	144	36	87	124	57	21	74	18	108
Mauritius	65	148	36	97	29	71	23	99	19	145
Mozambique	415	...	114	...	301	...	314	...	21	...
Seychelles	33	58	14	27	19	32	17	28	...	4
Somalia	327	485	224	128	103	157	87	158	...	20
Swaziland	103	76	55	78	47	2	28	29	188	53
Tanzania, United Rep. of	742	1011	467	652	375	359	415	474	3	14
Uganda	17	613	21	365	5	248	48	201	51	2
Zambia	371	...	27	...	398	...	545	...	152	...
Zimbabwe	65	...	20	...	76	...	39	...	82	...
TOTAL AFRICA										

Table 33. External debt and debt service ratios 1985 and 1989

Subregion, country	External debt outstanding and disbursed				Debt service as percentage of			
	Millions of dollars		As percentage of GDP ^a		GDP		Exports of goods and non factor services	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	40975	118582	53.95	81.84	7.15	9.22	28.45	42.39
Algeria	18374	28068	23.55	44.81	7.97	12.41	13.11	25.84
Egypt	40218	48799	126.75	168.30	10.02	10.31	53.85	87.08
Libyan Arab Jamahiriya ^{a/}	1978	3000	12.70	19.31	2.96	0.00	9.22	-
Morocco	18407	28851	107.14	119.83	7.65	11.67	18.41	57.93
Sudan	9127	12965	138.38	159.83	1.94	1.35	25.28	16.29
Tunisia	8880	8899	57.11	82.90	8.84	11.36	28.50	28.54
WEST AFRICA	44547	73348	35.54	109.01	6.72	7.10	10.83	10.62
Benin	812	1172	60.85	86.58	2.01	1.47	3.90	7.78
Burkina Faso	535	796	36.47	32.33	1.97	1.67	17.45	16.94
Cape Verde	97	130	84.56	92.48	4.14	3.84	18.10	22.43
Cote d'Ivoire	9346	15412	84.32	245.01	9.24	21.59	28.16	66.91
Gambia	245	342	133.76	189.83	1.47	10.16	0.23	18.79
Ghana	2174	3078	28.81	59.52	1.83	8.47	18.10	49.46
Guinea	2418	2176	49.44	88.43	2.48	4.59	8.03	14.55
Guinea-Bissau	304	458	29.49	120.03	0.62	3.04	5.29	22.20
Liberia	1047	1761	86.04	145.05	1.73	0.41	3.09	1.16
Mali	1868	2157	126.16	89.56	1.61	2.74	17.27	17.69
Mauritania	1082	2010	119.19	203.32	12.30	10.32	25.15	18.28
Niger	1008	1578	58.17	73.56	4.49	5.69	14.13	21.39
Nigeria	19051	12832	21.46	98.29	6.54	5.18	43.65	25.14
Senegal	2059	4139	83.83	122.81	3.73	11.25	10.80	46.60
Sierra Leone	124	1057	40.58	137.35	1.03	0.52	10.57	6.78
Togo	937	1185	106.06	84.15	11.88	6.39	24.20	18.66
CENTRAL AFRICA	14751	24040	48.36	85.96	8.35	7.51	13.93	18.74
Burundi	446	867	35.49	75.08	1.98	1.29	20.12	27.12
Cameroon	2940	4743	23.49	40.82	2.81	1.14	13.50	20.44
Central African Republic	348	716	43.70	59.16	1.94	2.48	10.53	16.55
Chad	186	168	21.31	35.47	1.04	1.12	5.39	5.57
Congo	3033	3116	110.92	183.86	18.59	13.63	32.10	29.52
Equatorial Guinea	132	228	157.34	254.77	2.12	6.33	6.33	16.98
Gabon	1207	1176	23.78	91.10	6.14	6.40	16.79	14.95
Rwanda	370	652	19.23	37.42	0.89	1.67	8.27	17.64
Sao Tome and Principe	62	131	163.57	109.13	8.79	11.57	23.71	35.33
Zaire	6027	8843	96.40	169.15	6.77	9.81	9.89	16.47
EAST AND SOUTHERN AFRICA	32609	46590	51.44	91.83	5.25	5.13	24.23	23.40
Angola ^{a/}	4560	6950	26.16	104.21	6.84	0.00	18.20	-
Botswana	334	513	37.41	28.13	40.23	1.77	68.86	5.95
Comoros	133	176	112.93	76.79	1.75	1.57	10.28	10.41
Djibouti	144	180	28.35	45.33	1.15	1.75	2.58	8.51
Ethiopia	1869	1013	36.71	50.48	2.19	4.69	19.07	40.31
Kenya	4309	5690	42.67	68.69	5.79	7.79	22.86	33.21
Lesotho	173	324	66.05	77.09	7.39	5.31	57.37	26.52
Madagascar	2460	1607	92.96	132.30	4.50	8.80	11.56	65.85
Malawi	1018	1394	70.64	86.66	7.21	5.91	29.89	31.26
Mauritius	629	832	36.22	40.71	8.21	7.00	11.60	10.16
Mozambique ^{a/}	2863	4737	54.18	145.18	6.29	4.59	142.93	75.50
Seychelles	98	168	32.16	57.30	3.51	8.19	7.09	16.50
Somalia	1639	2137	166.84	178.64	4.38	2.68	112.05	164.78
Swaziland	238	281	54.99	49.15	6.92	6.03	10.93	7.89
Tanzania, United Rep. of	1867	4918	59.83	169.80	1.18	3.00	19.03	26.93
Uganda	1171	1808	21.50	35.02	1.65	4.05	13.52	1958.13
Zambia	4639	6874	121.24	213.04	3.56	5.10	9.18	15.89
Zimbabwe	2465	1088	35.46	51.97	6.99	7.94	23.37	23.36
TOTAL AFRICA	182885	259460	47.47	89.64	6.37	7.67	20.80	33.08

Source: World Debt Tables 1989-90.

^{a/} Source: OECD.

Table 34. Terms of borrowing, 1985 - 1989

Subregion, country	Commitments (million \$ 100)		Average interest rate (percentage)		Average maturity (years)		Average grace period (years)	
	1985	1989	1985	1989	1985	1989	1985	1989
NORTH AFRICA	8191	10978						
Algeria	4114	6500	8.00	8.20	11.50	12.60	5.00	3.00
Egypt	2725	1464	7.40	6.50	25.00	14.50	9.90	4.70
Libyan Arab Jamahiriya	100	100	---	---	---	---	---	---
Morocco	1424	1410	8.10	7.10	15.50	17.30	4.10	4.10
Sudan	280	216	2.50	1.10	16.60	18.30	8.70	9.90
Tunisia	658	1388	7.90	7.20	15.60	15.90	4.90	4.50
WEST AFRICA	1108	4651						
Benin	55	189	3.60	3.60	11.10	12.20	8.20	8.50
Burkina Faso	100	256	2.10	2.10	18.00	11.40	8.30	8.10
Cape Verde	13	13	2.10	0.90	29.90	19.70	8.60	10.10
Cote d'Ivoire	510	510	10.00	9.30	15.40	19.40	4.70	5.90
Gambia	1	64	7.10	1.00	14.10	19.10	4.30	9.90
Ghana	461	567	3.20	2.80	10.40	13.10	7.20	8.90
Guinea	150	249	4.10	1.80	29.10	12.20	7.40	9.50
Guinea-Bissau	10	106	2.90	2.90	15.80	29.50	4.20	6.40
Liberia	47	---	4.90	---	31.00	---	6.80	---
Mali	141	272	1.30	1.00	41.90	13.10	9.10	9.10
Mauritania	107	183	2.10	2.50	29.20	26.90	7.20	7.40
Niger	91	141	3.00	1.80	27.90	27.30	1.20	8.80
Nigeria	1207	1613	8.90	7.10	12.70	18.60	1.90	5.10
Senegal	178	297	5.50	1.70	23.10	12.40	5.90	8.30
Sierra Leone	42	111	0.60	1.50	26.40	22.10	8.30	11.90
Togo	61	86	0.80	1.40	49.00	16.00	10.30	9.20
SOUTHERN AFRICA	1821	1719						
Burundi	139	81	1.40	1.20	37.70	37.40	9.10	9.80
Cameroon	449	685	7.90	7.40	17.60	19.50	4.60	5.50
Central African Republic	44	104	1.60	1.20	21.40	18.10	6.90	9.80
Chad	15	182	4.60	1.20	15.00	19.80	5.20	9.90
Congo	873	93	10.10	5.90	6.00	15.90	2.30	5.70
Equatorial Guinea	18	3	1.70	4.10	41.90	13.20	9.00	5.50
Gabon	291	135	10.10	7.10	10.20	15.60	2.80	5.00
Swaziland	95	136	2.70	1.50	26.50	35.20	8.10	9.00
Sao Tome and Principe	14	7	2.50	0.50	29.30	35.20	6.90	10.50
Zaire	227	292	2.80	1.10	37.90	41.40	8.50	10.20
EAST AND SOUTHERN AFRICA	2129	1079						
Angola	---	---	---	---	---	---	---	---
Botswana	69	77	8.40	5.00	18.40	24.10	4.00	26.50
Comoros	1	9	4.20	0.80	19.00	30.10	8.20	7.40
Djibouti	10	51	2.20	1.30	10.30	12.60	6.10	9.40
Ethiopia	418	601	3.10	2.80	21.30	28.70	4.50	3.60
Kenya	252	716	6.40	2.70	22.20	11.20	6.50	7.80
Lesotho	26	21	3.40	1.20	14.40	28.00	7.80	8.80
Madagascar	176	86	3.00	0.70	13.40	29.20	8.20	9.90
Malawi	180	113	1.90	0.80	44.60	19.40	9.20	9.90
Mauritius	41	294	2.90	1.00	10.30	40.40	7.60	9.80
Mozambique	161	294	2.90	1.00	10.30	40.40	7.60	8.80
Seychelles	15	28	7.20	7.00	17.90	14.40	4.30	5.20
Somalia	83	128	1.60	0.80	41.20	19.60	9.10	10.40
Swaziland	18	21	6.80	2.90	18.10	32.30	4.60	8.90
Tanzania, United Rep. of	71	106	1.10	0.80	43.90	43.00	10.30	10.20
Uganda	101	261	3.50	2.40	14.70	23.60	7.30	7.00
Zambia	261	56	2.10	9.10	40.60	6.60	9.80	1.50
Zimbabwe	148	435	6.20	7.60	22.50	12.90	6.70	3.10
TOTAL AFRICA	15151	20408						

Source: World Data Tables 1990-91

Table 35. External resources flows, 1984-1987

Subregion, country	Total net disbursements (million US \$)				Per capita (US \$)	As percentage of GDP	Official development assistance (million US \$)			
	1984	1985	1986	1987	1987	1987	1984	1985	1986	1987
NORTH AFRICA	6066	6641	4826	2850	22	1.97	3046	4067	3319	3580
Algeria	503	775	110	1176	51	1.85	122	173	165	222
Egypt	3079	2922	2557	2095	42	7.74	1768	1759	1667	1766
Libyan Arab Jamahiriya	135	47	78	123	30	0.55	5	5	11	7
Morocco	1230	1456	1094	795	34	4.98	351	838	336	401
Sudan	698	1140	884	792	34	10.72	622	1129	940	902
Tunisia	421	301	322	231	30	2.56	178	162	200	282
WEST AFRICA	2827	1909	4284	4863	27	6.98	2268	2408	3323	3426
Benin	110	98	96	86	20	5.36	78	96	138	136
Burkina Faso	188	191	284	281	34	16.66	189	197	284	283
Cape Verde	65	71	113	86	248	70.90	64	70	110	86
Cote d'Ivoire	405	241	435	328	29	4.98	128	125	187	254
Gambia	48	49	100	105	133	75.96	54	50	101	104
Ghana	208	200	196	434	32	8.55	216	204	372	373
Guinea	119	124	181	226	35	11.41	123	119	175	214
Guinea-Bissau	62	63	72	100	108	17.30	55	58	71	104
Liberia	244	288	257	274	118	25.18	133	91	97	78
Mali	323	381	365	357	42	21.06	320	380	372	365
Mauritania	185	231	175	183	98	21.89	175	207	221	178
Niger	137	289	295	339	52	18.17	162	305	308	348
Nigeria	537	242	1127	1766	17	4.19	33	32	59	69
Senegal	492	340	676	651	96	25.39	368	295	567	642
Sierra Leone	78	61	92	94	24	9.44	61	66	87	68
Togo	116	98	135	102	32	13.01	110	114	174	123
CENTRAL AFRICA	1793	1655	2265	2636	40	10.03	1234	1256	1599	1935
Burundi	156	158	186	189	38	16.28	141	143	188	193
Cameroon	284	232	232	332	31	2.82	187	160	225	213
Central African Republic	115	112	143	179	66	19.26	114	105	139	173
Chad	113	182	163	190	38	37.22	115	182	165	198
Congo	114	61	336	254	138	11.83	98	71	110	152
Equatorial Guinea	18	18	31	46	139	53.53	15	17	22	43
Gabon	61	203	310	427	404	14.63	75	61	79	82
Rwanda	162	186	217	253	39	15.57	165	181	211	243
Sao Tome and Principe	11	13	12	18	160	45.72	11	13	12	18
Zaire	758	491	635	740	23	14.50	313	324	448	621
EAST AND SOUTHERN AFRICA	4415	4741	5431	5815	33	12.02	3477	3833	4735	5596
Angola	202	259	276	219	26	4.06	95	92	131	135
Botswana	182	159	157	215	186	17.89	103	97	102	154
Comoros	43	51	47	53	127	31.02	41	48	46	53
Djibouti	131	103	79	88	182	23.30	102	81	115	92
Ethiopia	417	784	690	641	15	11.84	364	715	642	635
Kenya	543	532	685	601	27	7.09	411	439	458	565
Lesotho	96	120	92	102	63	28.71	101	94	88	108
Madagascar	284	209	321	362	33	13.44	153	188	116	327
Malawi	188	118	229	302	40	24.26	159	113	198	281
Mauritius	61	30	68	94	93	5.91	36	29	56	65
Mozambique	202	331	359	553	38	24.66	259	300	421	649
Seychelles	23	28	35	25	171	11.52	15	22	29	24
Somalia	176	371	614	605	88	50.06	350	354	523	580
Swaziland	54	32	44	38	53	7.98	10	26	35	45
Tanzania, United Rep. of	655	565	649	942	38	18.16	558	487	687	882
Uganda	166	227	199	302	18	6.94	164	184	198	276
Zambia	398	511	671	331	44	16.85	240	329	465	429
Zimbabwe	394	312	217	334	38	6.21	298	237	225	295
TOTAL AFRICA	15100	14946	16806	16164	29	5.59	10825	11564	12976	14537

Source: Geographical distribution of financial flows to developing countries (OECD 1989).